RPlan

Schedule Manager

User Guide
RPlan 6.2

207 E. Redwood St.
Suite 1000
Baltimore, MD 21202
USA
Phone 001 (410) 3 85-12 90
Fax 001 (410) 3 85-88 45
info@actano.com
www.actano.com

RPlan Version 6.2

Contents

Getting started 7

What is RPlan? 7
- Fundamental Concept 7
- Benefits 8
- Implementation 8

User information 9
- Audience 9
- Online help 9
- How to use these instructions 9

Installing RPlan 9
- Creating a shortcut 10

Starting and exiting RPlan 10
- Starting and logging in 10
- Using a shortcut 10
- Starting from within a browser 10
- Program certification 11
- Installing a plug-in 12
- Selecting RPlan modules 12
- Changing your password 13
- Exiting RPlan 13

Working with RPlan 15

Schedules, projects and departments 15
- Structure trees 15
- Ownership principle 16
- Getting started with RPlan 16
- Project structure tree 16
- Organization structure tree 18
- Creating a personal schedule 18
- Creating a schedule in a project 19
- Selecting schedules 20
- Sorting schedules 21
- Deleting a schedule 22

Editing schedules made easy 24
- Moving the screen separator 24
- Left screen area 24
- Adjusting column width 25
- Entering activities 25
- Changing activities 27
- Go To 27
- Zooming in/out 28
- Activity classes 28
- Deleting activities 29
- Undo 29
- Saving 29
- Update 29
- Moving activities with the mouse 30
- Changing activity duration using the mouse 30
- Cutting and copying activities 31

Structuring schedules by means of summary tasks 33
- Summary bar and *One Row* display mode 33
- Creating summary tasks 35
- Deleting a summary task 35
- Promoting and demoting activities 36
- Showing/hiding outline levels 37

Ease of use through favorites lists 38
- Saving favorites lists in the selection dialog 38
- Selecting favorites lists 39
- Changing favorites list properties 39
- Deleting a favorites list 40
- Saving favorites lists in the working view 40
- Display options 41
- Saving a user-defined layout 41

Simple functions for a better overview 42
- Changing the schedule selection 42
- Identifying activities 42
- % Completed 43
- Hyperlinks 43
- Standard filters 43
- Text and date filters 44
- Applying and disabling filters 45
- User-defined filters 45
- Saving filters 46
- Editing saved filters 47
- Copying filters 47
- Deleting filters 47
- Task notes 47
- Adjusting dates 48
- Target/actual comparison 49
- Language versions 50

Actively networking projects 50
- Linking within a schedule – Autolinks 51
- Constraint types when linking 53
- Cross-schedule linking – Synchrolinks 54
- Expanding Synchrolinks 55

Adjusting Synchrolinks 56
Project-wide coordination - Active Links 57
Creating Active Links 57
Responding to an Active Link 61
Deleting an Active Link 63
Overview of all Active Links and Synchrolinks 64
E-mail notification 65

Importing and exporting planning data 67

Data exchange options 67
Exporting RPlan data 68
RPlan export schema for Microsoft Project 2000 69
Importing schedules 70
Importing selected activities 71

Printing 73

Printing 73
Working view and layout 73
Page setup 73
General tab 74
Headers and footers 75
Page tab 76
Print preview and printing 76
Saving page setup settings 78
Printig Active Link logs 78

Index 80

Chapter 1

Getting started

What is RPlan?

RPlan is a modular planning and control system for project schedules and resources which is practical, user friendly and easy to learn.

RPlan documentation is divided into three manuals.

RPlan Schedule Manager: This manual is designed to help normal users familiarize themselves step by step with the RPlan Schedule Manager, the basic project planning module in RPlan. But even experienced users will find answers to their questions here.

This manual is best used after your system support staff has set up administrative structures such as departments, users, projects, etc.

RPlan Administration: This manual addresses RPlan system support staff and all RPlan users responsible for administrative tasks such as creating or changing departments, users, projects, etc.

RPlan Resource Manager: This document describes the RPlan resource planning module, a modular add-on to the Schedule Manager.

Fundamental Concept

Whenever a large number of people are involved in a project, there is an intensive need to communicate information about the content and organization of the project. Scheduling the project in particular is of vital importance. For example, colleague A postpones an activity because a decision, upon which his/her work depends, has also been delayed. Colleague A forgets to inform colleague B about this delay, and perhaps doesn't even know that colleague B

requires this information. This of course means that colleague B's schedule is also delayed without his/her knowledge. Colleague C depends on colleague B and so on and so on.

These types of problem can be prevented if there is a location where all project schedules are managed in such a way that every project member has access to them. However, this task should not be assigned to a central planning department as this would only create another communication interface where information could go astray. Instead, all members of the project should be empowered to integrate, easily and directly, the project schedules for which they are responsible into an overall project planning system, thus allowing the members of the project to directly resolve any schedule conflicts. This is the fundamental concept of RPlan.

Benefits

The main features of RPlan are

- multiple project management with simple access to individually required data in project and organization structures,
- practical combination of top-down and bottom-up planning strategies,
- direct communication between the project members by means of the integrated interface known as *Active Link*,
- ease of operation when entering and changing schedules without the need for extensive training effort,
- enhanced graphical display and user guidance for Synchrolinks and Active Links,
- a clear distinction between project and resource roles in the Resource Manager,
- platform independence through use of Java technology, and
- simplified administration through intranet/Internet capability.

These features ensure that all members of the project are able to schedule their own activities and coordinate them with those of others. It is important that each and every member of a particular project makes active use of project planning as this is the only way to avoid loss of information due to inadequate communication.

Implementation

RPlan features sophisticated project and user management functions which allow authorized users to access the current planning data at any time. Project data is stored centrally and can be easily compiled as required for editing in a variety of tree structures.

Editing of planning data is as simple and intuitive as possible. This increases acceptance among novice PC users and substantially reduces training effort.

User information

Audience

This guide introduces you to RPlan step by step. It is directed primarily at those who have never worked with RPlan or a similar program before. By reading the instructions and simply trying the procedures described you will quickly be able to start using RPlan independently. The only prerequisite is basic knowledge of working with PCs, for example word processing programs. No special knowledge is needed.

Furthermore, the guide is also suitable for experienced users who are already working with RPlan, but who are looking for answers to particular questions. The table of contents or the index will tell you which actions will provide which results quickly and easily.

Online help

In addition, RPlan offers online help so that you can find answers to yours questions directly on screen. To invoke the online help, you choose the menu item *Help* or, if you are in a dialog box, the *Help* button.

How to use these instructions

These step by step instructions contain a few special conventions which are intended to improve overall clarity and readability. The following design features will help you find your way around easily:

- All **function icons** are displayed in the margin next to the respective section. This means that you can immediately see which icon you have to click in order to call up a certain function.
- **Tips, notes and warnings** are included in gray text boxes in the corresponding topic-related section. This simplifies searching for topics.
- **Brief instructions** are always printed in the margins at the end of a chapter or section.

Installing RPlan

No client installation need be performed if the Java version of RPlan is used as the application is downloaded from the intranet/Internet to the workstation system each time it is started. All you need is access to the RPlan page of your intranet.

A description of server installation is not within the scope of this manual.

Creating a shortcut

You can start RPlan directly without having to go via your browser. A prerequisite is that you have access to the RPlan server. Enter the following to create a start menu shortcut in Windows 95/98/2000/NT:

Target: <path>\rplanjava_jre_win.bat

Start in: <path>

Ask your system administrator for the relevant paths.

Starting and exiting RPlan

Starting and logging in

You can start RPlan Java in one of two ways. As in conventional applications, you can create a shortcut on the desktop or in the start menu of the client system and use it to start the program. Alternatively, Java technology enables you to start RPlan via the intranet/Internet directly from within your browser program - without the need to install the program on the client system. The only prerequisite is that you have access to the appropriate intranet.

Using a shortcut

Start RPlan using the start menu. You are then prompted to log in. Enter your login name (e.g. your personnel number) and your password in the login dialog box and then click on OK or press the *Enter* key.

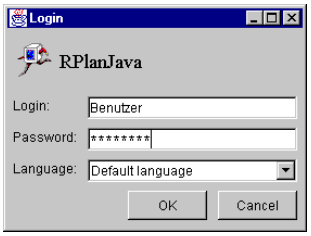


Figure 1: Login dialog box

Starting from within a browser

RPlan Java can be started directly from the intranet or Internet at any workstation without the need for the program to be installed there. When accessed through the intranet th login dialog box for RPlan appears as a form. Enter your login name (e.g. your personnel number) and your password and confirm your input using the Login button or the appropriate button on your intranet page

If, instead of the login dialog box, you receive a message prompting you to install a plug-in, this means that your browser does not support the Java components used in RPlan. You cannot start RPlan until you have installed the plug-in.

Figure 2: Example of an RPlan login page in the browser

If you have not been registered as a user in RPlan, please contact your system administrator or your RPlan organization manager so that you can be granted access to the planning system.

Login and/or password is wrong

If you receive the message *Login and/or password wrong* when you log in, check that your login name and/or password is valid and that you have typed them correctly. You should use only lowercase letters for your login name. A distinction between uppercase/lowercase is made for your password. Check whether the *Caps Lock* key on the keyboard is depressed. Otherwise please contact your system administrator or RPlan organization manager.

Program certification

Executing specific functions of a Java application such as printing or importing data via the intranet/Internet always involves a certain risk as data whose origin cannot be conclusively verified is downloaded to the local system. The option of certifying programs has been provided for this very reason.

A certificate is issued and encrypted by the application vendor. You must then compare the program with the certificate so that you can use critical functions. The encrypted information of the certificate is compared with the corresponding information in the program. A warning is output if the information is not identical.

A security message is issued as soon as you load the login page in the intranet. Click on *Grant always* to accept the certificate. The *Login* dialog box for RPlan is not shown if you click on *Deny*. To view the certificate, click on *More Info* (Figure 3).

Figure 3: Certification warning

Installing a plug-in

If your browser does not support the Java components used in RPlan, you are prompted to install a plug-in when you call the RPlan welcome screen. You must install the plug-in as follows before you can use RPlan.

Netscape

1. A Plug-In message box appears. Click on *Get the Plug-In* in the plug-in message.
2. In the dialog box now shown select the directory in which you want to store the installation file and click on *Save.*
3. Go to the directory and double-click on the installation file to start installation.
4. Acknowledge the licensing agreement and confirm the installation directory for the plug-in.
5. Installation of the plug-in is started. Once installation is complete, call the RPlan welcome screen in your browser. You are then shown the login dialog box.

Internet Explorer

1. When you call the RPlan welcome screen, the plug-in file is automatically downloaded and unpacked.
2. Acknowledge the licensing agreement and confirm the installation directory for the plug-in.
3. Installation of the plug-in is started. Once installation is complete, call the RPlan welcome screen in your browser. You are then shown the login dialog box.

Selecting RPlan modules

RPlan makes a number of different modules available. When you log in, you see the RPlan framework on your screen. The RPlan bar on the left shows all the modules available to you. Click on the module you want. It is then opened in the

framework. You can open several modules each in a separate window. Switch between the modules using the *Window* menu.

You can hide/show the RPlan bar by clicking on one of the two arrow symbols in the separator bar.

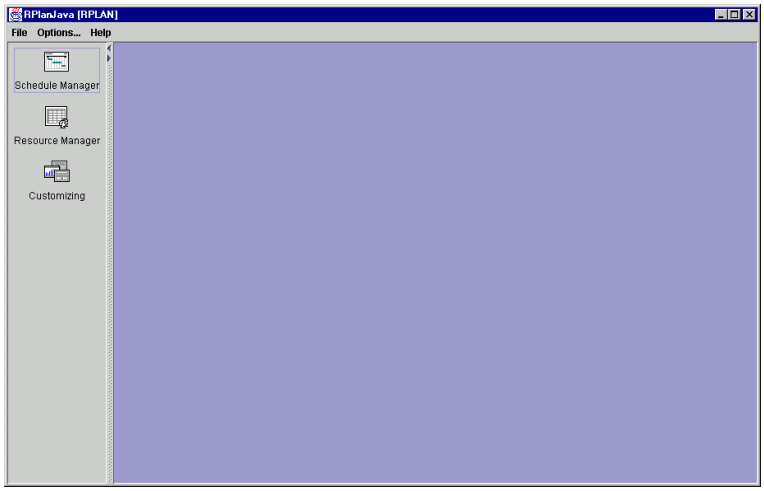


Figure 4: RPlan framework for selecting RPlan modules

Only those modules you are authorized to access are shown in the RPlan bar.

Changing your password

In RPlan choose the menu items *Tools* → *Change Password* to define a new password. Enter your new password and repeat it in the second line (Figure 5). Click on *OK* to apply the new password.

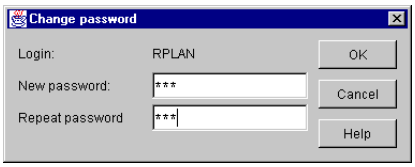


Figure 5: Changing your password

Changing your login name

By contrast to your password, you cannot change your login name yourself. If a change becomes necessary, please contact your system administrator or RPlan organization manager.

Exiting RPlan

To end your RPlan session, choose the menu items *File* → *Exit*. You will be asked if you wish to save your own data. RPlan is exited once you have responded to this question.

Chapter

2

Working with RPlan

Schedules, projects and departments

Structure trees

RPlan is a client/server system.. This means that all data in RPlan is stored on a central computer known as the server. This data can be downloaded to each desktop PC (client), processed there and written back to the server. The great advantage is that all data is accessible to all users at all times. To ensure that this advantage is actually exploited, it is necessary to appropriately structure the data stored on the server so that it can be found quickly and reliably.

With this in mind, structures in the form of a project tree and an organization tree are maintained in RPlan (Figure 6). The logical structure of these trees simplifies targeted access to the desired planning data.

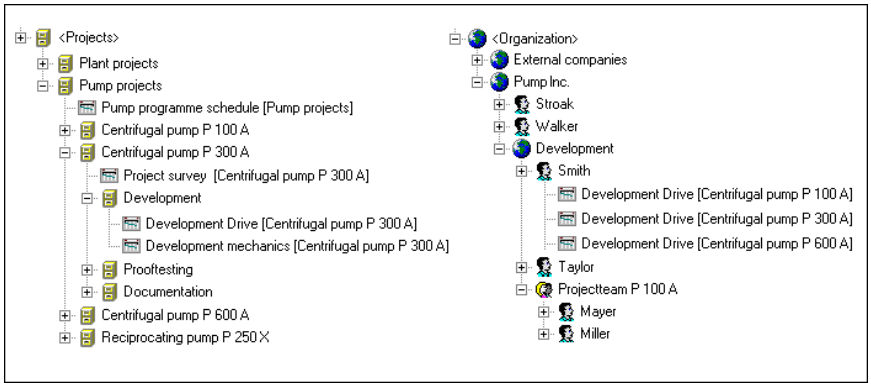


Figure 6: The project tree (left) and the organization tree structure data storage in RPlan.

Central data storage on the server naturally raises the question of who should be allowed to create, modify or delete data. If every user were able to alter the tree structure, the trees would grow unchecked with the result that users would lose track. This is why only certain users are authorized to modify the structure (see also documentation RPlan administration).

Ownership principle

The ownership principles which apply to the project and organization structure are just as important for the planning data itself, i.e. the question of rights. Who is allowed to add, modify or delete specific data in the system? In RPlan this problem is solved by the principle of ownership. The planning data is spread over individual schedules which each have their place in the structure tree. Each of these schedules is assigned to a single user as the designated owner. Only the owner of a schedule is authorized to edit it. All users are allowed to see the schedules of other users (referred to as foreign schedules in this manual) but not to modify them.

Getting started with RPlan

After you have logged in (see also "Starting and loggin", page 10) a *Selection* dialog box is opened (Figure 7). In this dialog you can choose one of four windows by means of tabs: *Projects*, *Organization, Views* and *Links*. The first two provide access to the project and to the organization structure tree, whereas the third tab lets you define your own list of schedules, known as views (see also "Ease of use through favorites lists", page 38). The *Links* tab provides an overview of the valid *Active Links* and *Synchrolinks* for the user currently logged in (see also "Actively networking projects", page 50).

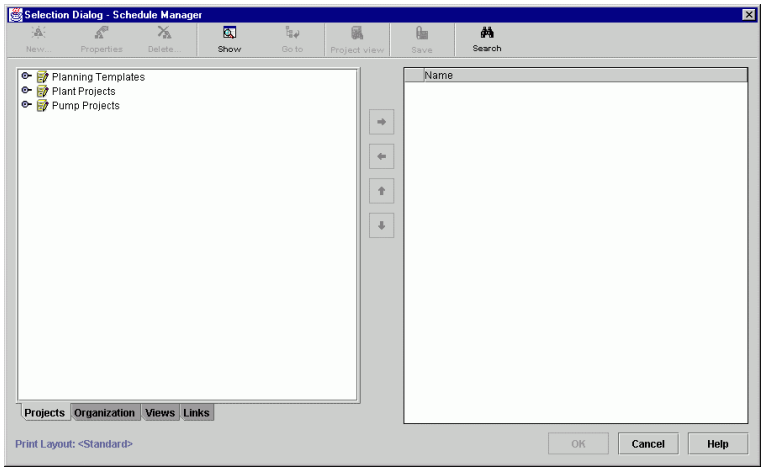


Figure 7: Selection dialog box

Project structure tree

The *Projects* tab of the selection dialog box shows you the first level of the project tree. All projects on the top level of your company's project structure tree are listed here. By double-clicking on one of these projects, e.g. "Pump projects", you can display all projects assigned to the pump projects (Figure 8) on the next level down.

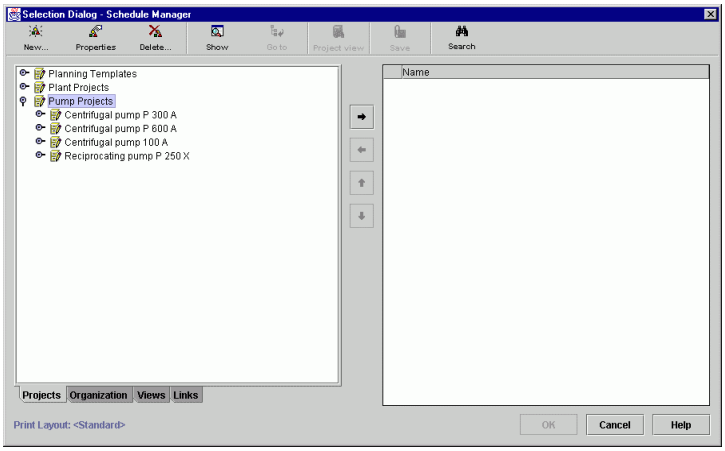


Figure 8: Showing lower-level projects by double-clicking

By double-clicking again you are shown the next project level down, and so on. Figure 9 shows an example of this. The project tree contains two different types of elements: projects and schedules – recognizable by the different icons.

Projects and schedules

Projects are criteria used to structure the project tree. The filing cabinet symbols represent projects and contain both schedules and possibly sub-projects (Figure 9).

Schedules are the actual worksheets in which planning data can be entered. They are represented by a stylized worksheet in the structure tree. Each schedule is assigned to an owner (see also "Ownership principle" , page 16). Only the owner is authorized to modify a schedule. All other users are authorized to read the schedule. To enable data to be found quickly and reliably, schedules are usually assigned to a project in the project structure tree.

Your own projects or schedules are highlighted by a stylized pen which indicates that you have write permission for the project or schedule.

If your RPlan installation includes both the Schedule Manager and the Resource Manger, the icons for resource schedules and projects feature an additional stylized histogram for identification purposes. This is of no relevance for the Schedule Manager.

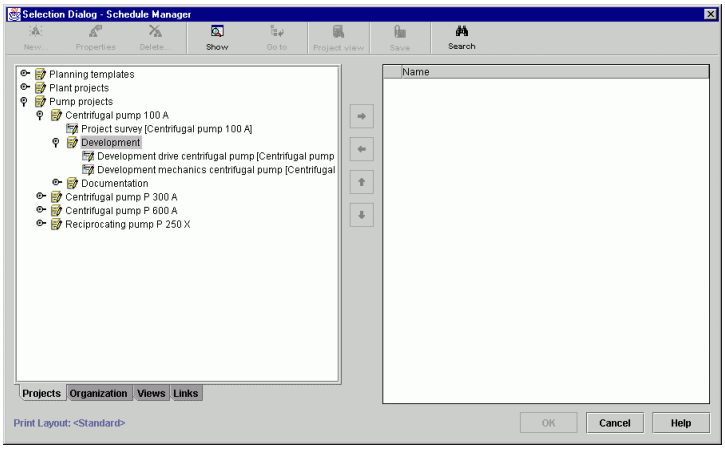


Figure 9: The project tree with projects and schedules

Organization structure tree

Icons in the organization tree

The icons in the organization tree have the following meanings:

Department

Project team

User

Schedule

Own object

If your RPlan installation includes both the Schedule Manager and the Resource Manager, the following icons are also used:

Resource: to be treated like a user

Pool: has no function in the Schedule Manager.

RPlan has not only a project structure tree but also an organization structure tree which contains all users and schedules. The organization tree can be shown using the *Organization* tab (Figure 10). In the *Organization* window you are shown, as in the project tree, the departments of the highest organization level. Double-clicking on a department shows the next level down. The various elements of the organization trees are identified by different icons.

Each RPlan user is assigned to exactly one department in this tree but may belong to one or more project teams. Double-clicking on a user icon shows all schedules owned by the user.

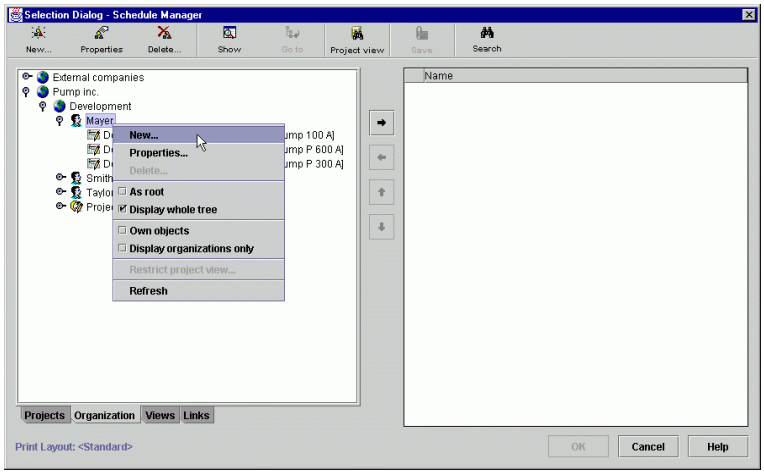


Figure 10: The organization structure tree and context menu for creating a schedule

Creating a personal schedule

To create a schedule, you select the *Organization* tab in the selection dialog box and highlight your own name in the organization tree. Click on the *New* button (or right mouse button → *New*). In the *New (Schedule)* (Figure 11) dialog box you enter a name for your schedule. Your name is already displayed in *Owner*. Click on *OK* to create the new schedule (Figure 12).

Context menu

Context menus provide appropriate commands for the highlighted objects. Click with the right mouse button on a highlighted object and choose the desired command in the context menu using the left mouse button (Figure 10).

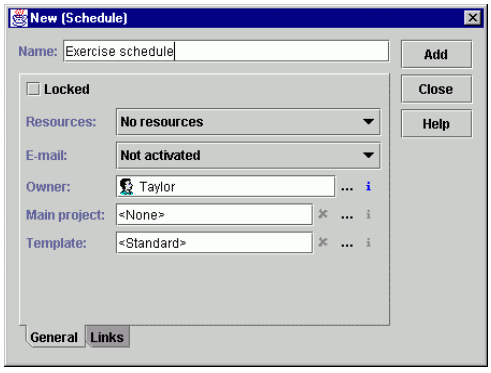


Figure 11: Creating a schedule

The *New (Schedule)* dialog box remains open so that you can add further schedules. Click on *Close* when you have finished adding schedules.

RPlan administration

You will find detailed information on creating schedules, projects and departments as well as on granting rights in the manual "RPlan administration".

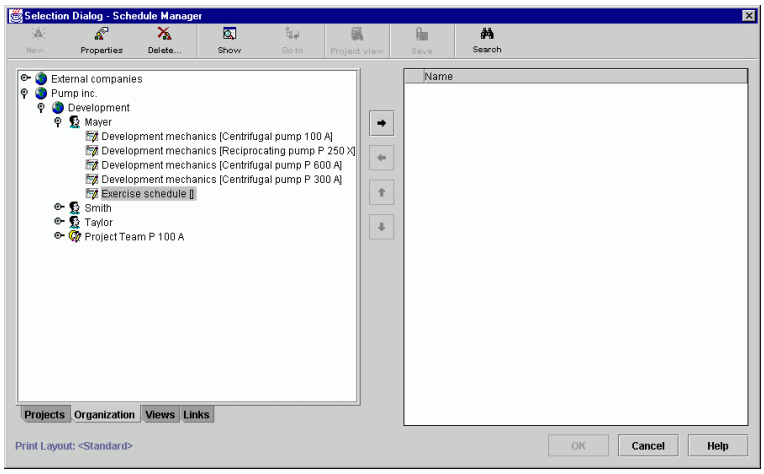


Figure 12: The newly created schedule named "Exercise schedule"

Creating a schedule in a project

Rights when creating a schedule

Schedules may be created in a project only by the

- owner of the project, or
- a person belonging to a rights group authorized to do so (see also the documentation RPlan administration).

Schedules can be created by

- all users

under their own name in the organization structure tree.

A schedule created as described in the section "Creating a personal schedule" is accessible only via the organization tree. To create a schedule in a project, highlight the relevant project in the project tree choose *New* button.

However, you must remember that only a few RPlan users are authorized to create schedules in the project tree. This is the only way to prevent unchecked growth of the project tree which would make the tree difficult to read and would make projects and schedules difficult to find.

If the *New* menu item is disabled or if you receive a message that you are not authorized to create the schedule, contact your RPlan administrator or a colleague who is authorized to create a schedule.

Selecting schedules

You may open several schedules at the same time in RPlan. The schedules are arranged one directly below the other in the user interface. To select the schedules you choose *File* → *Open* or the button shown. The *Selection* dialog box (Figure 13) displays the project tree in the left window. Repeated double-clicking on the project tree takes you down to the level with the desired schedule.

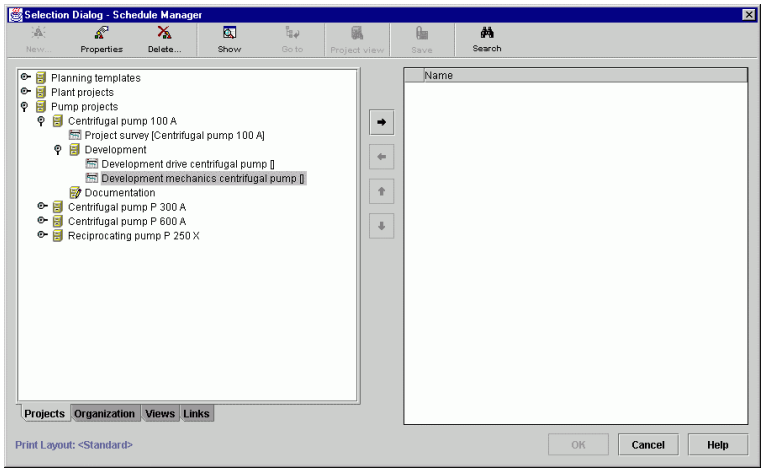


Figure 13: The *Select Schedule* dialog box

Highlight the schedule and click on the arrow button pointing to the right in order to add the schedule to the selection list of schedules to be opened. Repeat the same procedure for further schedules until the list of desired schedules is complete.

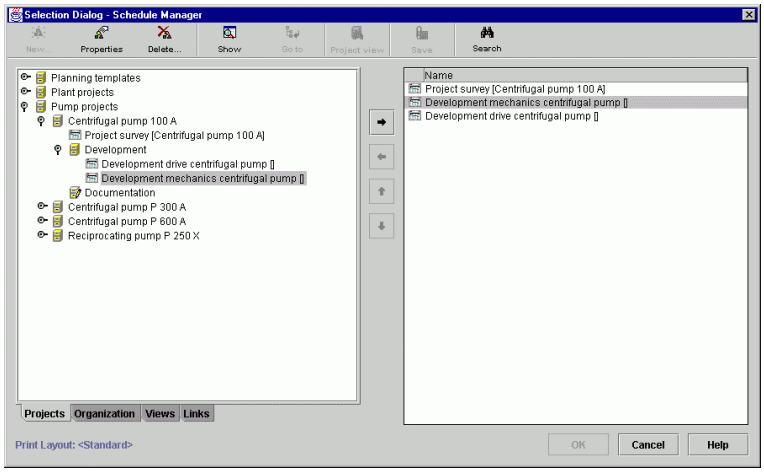


Figure 14: The selected schedules are displayed in the right window.

In the selection list (Figure 14) the main project to which the schedule is assigned is displayed next to the name of the schedule (see also "Creating a project" in the documentation RPlan administration).

Selecting all the schedules of a project

To select all the schedules of a project at the same time highlight the desired project and click on the arrow button.

All the schedules directly assigned to the project are displayed in the selection window but not the schedules assigned to sub-projects.

If one of the entries in the selection list is not readable because the column width is too narrow, position the mouse cursor on the column boundary in the header of the selection list. As soon as the shape of the mouse cursor changes into a double-arrow symbol, click and hold down the left mouse button and drag the boundary in the required direction. The column width is automatically changed as soon as you release the mouse button.

Selecting schedules

You can select schedules using the project tree, the organization tree or using views. To do this, click on the *Organization* or *Favorites lists* tab and expand the organization tree down to the desired point or select the desired view (see also "Ease of use through favorites lists", page 38). A mixed selection from all three tabs is, of course, also possible.

Sorting schedules

Brief instructions: Selecting a schedule

1. Open file
2. Select Project, Organization or View tab
3. Show tree levels by double-clicking

In the right dialog window the selected schedules are displayed in exactly the same order as you selected them. They will be ordered like this (one below the other) later in the working view but you can sort them first using the arrow buttons. In the right window highlight the schedule you want to move and click on the up or down arrow button. The schedule is then moved up or down one position (Window size

Figure 15).

The arrow pointing to the left is used to remove schedules from the selection list.

can be changed by dragging the edge of the window with the left mouse button held down. This provides you with a clear view of complex project trees.

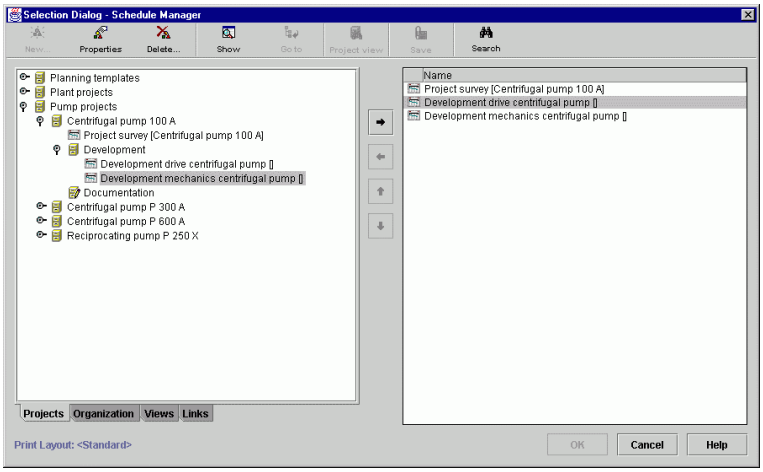


Figure 15: Resorted selection list (as compared to Figure 14)

Window size

The size of the selection dialog box can be changed by dragging the edge of the window with the left mouse button held down. This provides you with a clear view of complex project trees.

When you have finished selecting and moving schedules click on *OK* or press the *Enter* key. The selected data is now arranged into a working view (Figure 18).

Deleting a schedule

To delete a schedule highlight it in the project or organization and click on the *Delete* button. In the following submenu you then select *Schedule and All Links* to finally remove the schedule. (For information on *Only Selected Link* and *All Links* refer to "Deleting a schedule" in the documentation "RPlan administration")

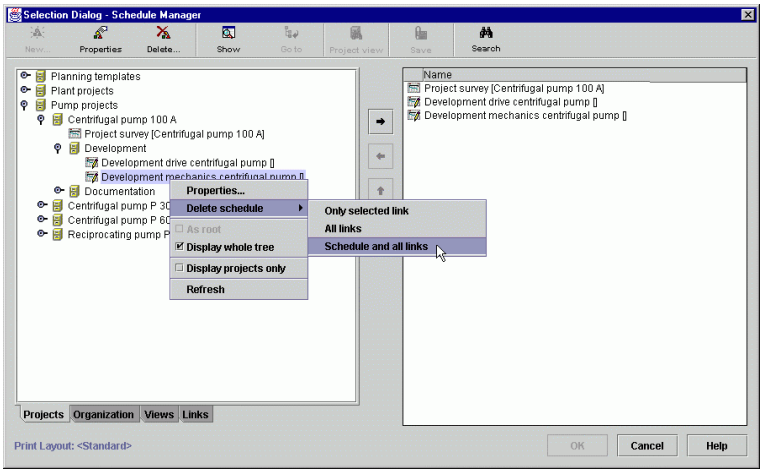


Figure 16: Deleting a schedule using the context menu

Buttons and context menu in the selection dialog box

You create, change or delete all objects (schedules, departments, views, etc.) in the selection dialog box using either the toolbar or the right mouse button and context menus. The following commands are available to you.

- ***New*** lets you create a new object. You are shown the appropriate dialog box depending on whether you have clicked on a project, schedule, department or other object.
- ***Properties*** lets you edit object properties such as name or owner. This function also lets you query the properties of an object, e.g. the owner of a schedule.
- ***Delete*** removes an object you have selected.
- ***Projects only*** shows projects but no schedules in the project tree. You redisplay the schedules by selecting the menu again. *Organization only* works in the same way. This command is also available if you click on *Display* in the toolbar.
- ***As root*** displays only the branch of the structure tree below the selected object. Choosing *Whole tree* redisplays all objects . This command is also available if you click on *Display* in the toolbar.
- ***Own objects*** restricts the view to your own schedules. If you click on *Own objects* again, you are shown the complete organization structure. This command is also available if you click on *Display* in the toolbar.
- ***Restrict project view*** is available only to organization managers and administrators. It allows them to restrict access rights for individual users or departments.
- ***Refreshing*** reloads the structure tree from the database. The tree is collapsed to show only the top level.

In contrast, clicking with the right mouse button on an object in the selection list (right side of the dialog box) offers the following menu options.

- ***Remove*** removes the schedule from the current selection.
- ***Move up*** shifts the selected schedule one position up in the selection list.
- ***Move down*** shifts the selected schedule one position down in the selection list.
- ***Properties*** lets you edit the object properties.
- ***Save as view*** lets you save a view.(see also "Saving favorites lists in the selection dialog", page 38).

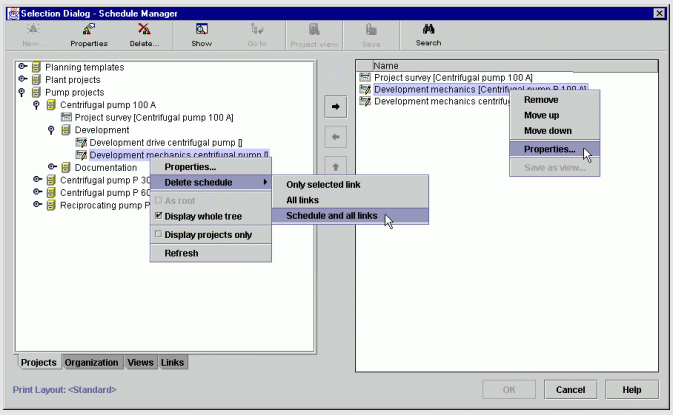


Figure 17: Context menus in both windows of the *Selection* dialog. In reality it is not possible to display both at the same time.

Editing schedules made easy

Once you have made your selection of schedules, you can see the working view which has been divided up into two areas on the screen (Figure 18). On the left, all activities are displayed in a table whereas on the right, you can see planning data presented schematically in the form of a schedule bar.

Moving the screen separator

To optimize the relative sizes of the table section and the Gantt bar charts to suit your needs, position the mouse cursor - without pressing a mouse button - on the gray bar separating the two display areas. As soon as you move over the bar, the mouse cursor changes into a double-arrow shape (see left). Hold down the left mouse button and drag the bar to the left or right. Do not release the mouse button until the bar is in the position required.

Brief instructions: Splitting the screen

1. Split the screen by dragging the separator bar.
2. Adjust the column width by dragging the separator bar in the column header.
3. View the activities bar using *Go To*.
4. Zoom in or out using the magnifying glass icons.

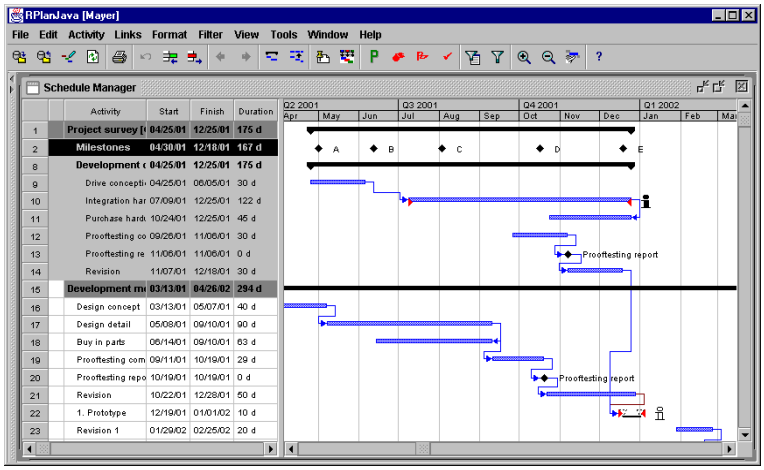


Figure 18: The worksheet with the selected schedules

The working view can also be split horizontally in the Java user interface. To split the view, choose the menu commands *View* → *Split*. You can use drag-and-drop to change the proportions of the split view.

Left screen area

The tabular representation of the planning data contains the following columns:

- **Activity** containing the schedules with the activities (see also rectangle below).
- **Start** indicating the beginning of the corresponding activity.
- **Finish** indicating the end of the activity.
- **Duration** indicating the duration of the activity in days.
- **Responsible** indicating the person responsible for the activity.
- **Remarks** containing brief comments on individual activities.

All schedule titles are shown against a green background. Fields that cannot be edited by the user because he/she does not have the appropriate rights are shown against a gray background. This is the case, for example, in foreign schedules, i.e. those that belong to a different user.

Schedules and activities

Schedules comprise individual activities. The name of the schedule is shown against a green background in the working view and is not indented. Schedules must first be created before they can be supplied with activities in the working view (see also "Creating a personal schedule", page 18 and in the documentation RPlan administration).

Activities is the name given to date entries in a schedule. They are arranged below the schedule name and are indented. Activities can be structured on different outline levels (indented, bold) in a schedule – the method is described in the section "Structuring schedules by means of summary tasks", page 33. Fields shown against a gray background cannot be edited because, for example, they belong to the schedule of another user.

Adjusting column width

To change the column width in the table section, you position the mouse cursor – without pressing a button - in the grayed table header with the column titles. When you move across the separator between two columns, the shape of the cursor changes to a sizing symbol. You now press the left mouse button and move the separator to the left or to the right without releasing the button. The column width changes accordingly.

Entering activities

Choose the menu items *File* → *Open* to open a schedule of which you are the owner. If you do not yet own a schedule, create one if you are authorized to do so (see also "Creating a personal schedule", page 18) or have an authorized user create one for you.

Enter activities only in your own schedules

You may enter or change activities only in your own schedules.

The table entries of foreign schedules are shown against a gray background and cannot be changed.

Proceed as follows to add a new activity:

1. Highlight a row and click on the insert icon (see left). A new row with the name "New task" is inserted above the highlighted row. The current date is automatically entered as the start and finish date.
2. Click on the "New task" cell, enter a name and then press the *Enter* key.
3. Double-click on the start and finish date. Enter a date or click on the selection button to choose a date in the calendar. Alternatively, you can enter a duration in days in place of one of the two dates.

Entering a date

RPlan also recognizes the following character strings as dates:

- 9.9.1999
- 9.9.99
- 9-9-99
- 9,9,99
- 9,9
- 9,

If the year or the month is missing, the current year or month is assumed.

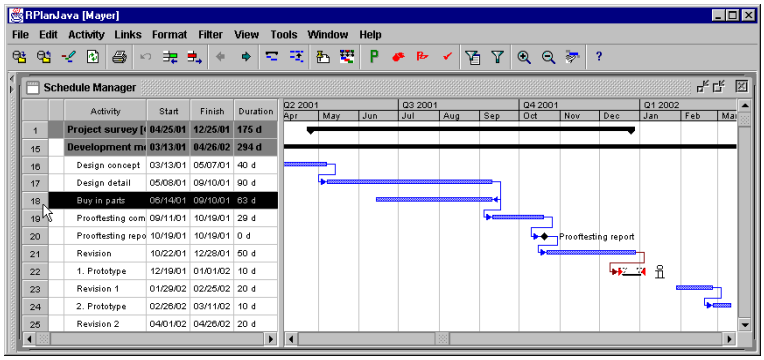


Figure 19: Above the highlighted row ...

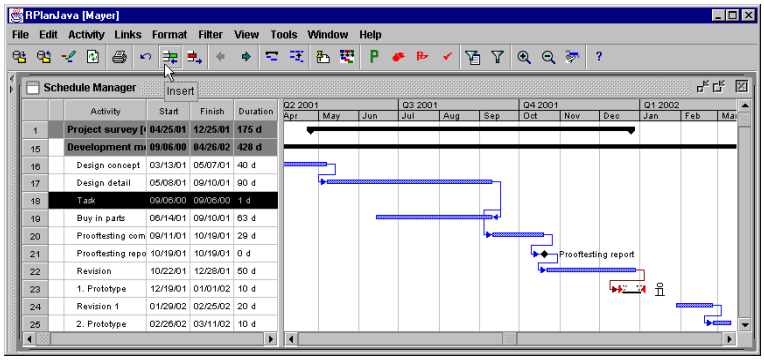


Figure 20: ... you insert a new task ...

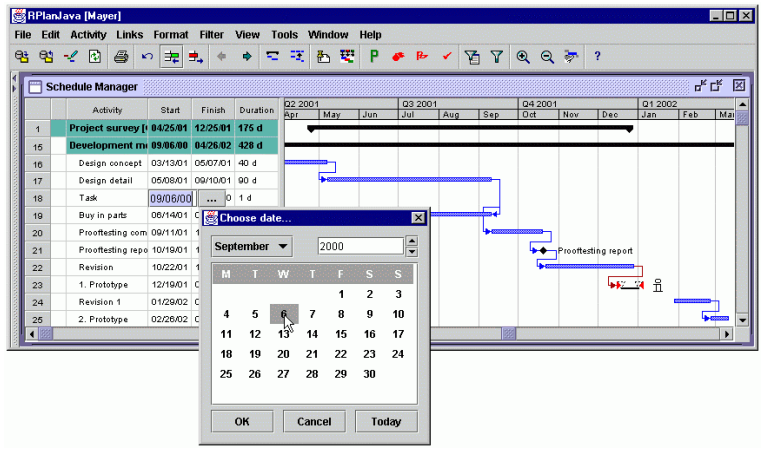


Figure 21: ... and then name and schedule it.

The date you entered has not been accepted?

If the program modifies your date input "of its own accord", it is generally because the date you entered is not a working day. The system automatically enters the next working day.

Changing activities

You can rename or reschedule your *own* activities at any time. To do this, highlight the appropriate field in the table section, type a new name or enter new dates, and then press the *Enter* key.

When you change dates you should note that each time you make one of the three entries (start date, finish date or duration) rescheduling is automatically performed on the basis of the last two entries changed. It can happen, for example, that entering a new finish date also changes the start date. In this case, the duration was defined as the last entry but one. A new start date is then automatically calculated using the last two entries – i.e. the duration and the finish date.

Your changes immediately update the Gantt bar chart display in the right part of the screen. If no changes are visible, there may be various reasons for this:

- The bar is outside the time period shown.
- The timescale displayed is too coarse.
- No activity class has been assigned to the activity.

Go To

A very simple way of moving an activity bar into the visible area of the right window is the *Go To* function. Highlight the desired activity in the table and click on the *Go To* icon. The schedule bar of the highlighted activity is moved into the display area as in the case of "Buy in parts" in Figure 23.

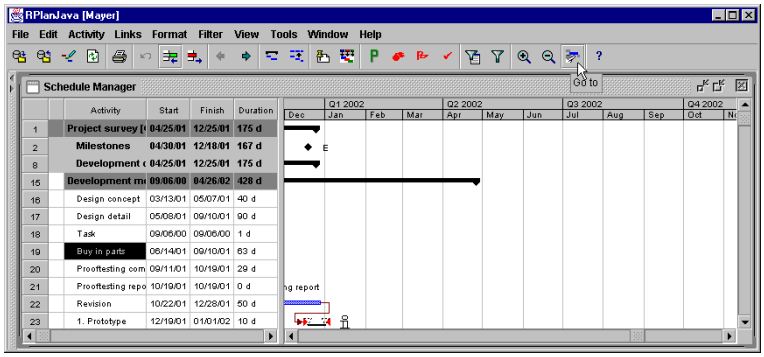


Figure 22: The schedule bar for the "Buy in parts" is ...

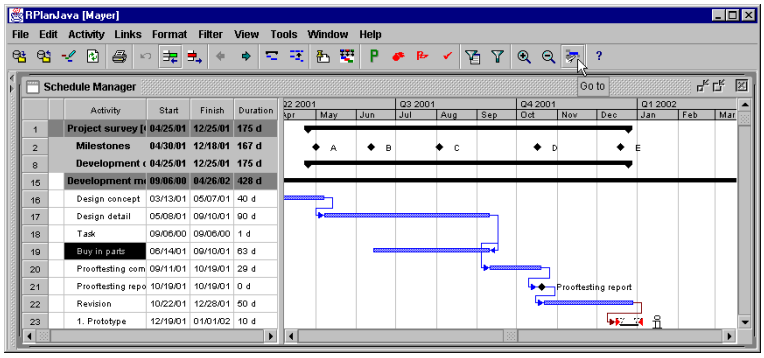


Figure 23: ... moved into the display area using Go To

Zooming in/out

The total duration of the schedule cannot be shown fully in the graphical Gantt bar chart display in Figure 23. In this case you should zoom out by clicking on the *Minus* magnifying glass icon.

The timescale can be changed in four preconfigured levels:

- Weekly view
- Monthly view
- Quarterly view
- Yearly view

To move, for example, from the yearly view to the monthly view, you click twice on the *Plus* magnifying glass icon to zoom in. Conversely, clicking on the *Minus* magnifying glass icon zooms out one level.

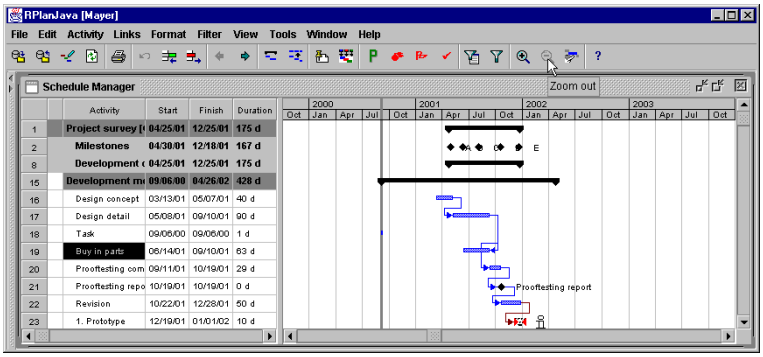


Figure 24: Same view as Figure 23, but zoomed in to yearly view

Zooming in is always recommended as the first measure if the schedule bar is not visible in the display area even after you have used the *Go To* function. The reason is often that the activity is so short that it appears only as a dot on the screen. You should zoom in to the weekly view and, if necessary, click on *Go To* a second time.

Activity classes

Various types of activities, known as activity classes, are represented by means of different bar chart forms (shapes and colors) in RPlan. Each company can define its own activity classes to make sure that the same icons are used throughout the company. This ensures that schedules have a uniform look and enables activities to be filtered according to specific activity classes, e.g. all procurement operations.

Multiple selection

Select several activities to be assigned the same activity class by holding down the *Ctrl* key, clicking on the desired activities one after the other, and then releasing the *Ctrl* key. Then choose the activity class.

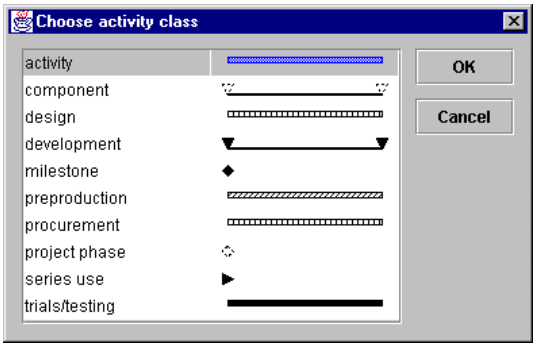


Figure 25: The selection dialog box for activity classes

To assign an activity class to an activity, you first highlight the activity class. You then click on the *Activities Class* icon which brings up the selection dialog box in Figure 25. Here you highlight the desired activity class and confirm your choice with *OK* or the *Enter* key.

Brief instructions Activity classes:

1. Highlight activity in table section.
2. Click on Activity class icon.
3. Click on activity class in selection dialog.

The display of events which, by definition, have no duration (for example, the milestones in Figure 23) is defined on the basis of the assigned activity class. The position of events in the diagram is determined by the start date of the activity.

Deleting activities

To delete rows, you highlight them and click on the icon shown on the left.

If your RPlan installation includes both the Schedule Manager and the Resource Manager, note that you cannot delete activities for which there are resource requests or approvals.

Undo

All actions you perform in the planning interface of RPlan can be immediately undone . Simply click on the *Undo* button to revert to the original status. Changes to Active Links cannot be undone as they are written directly to the database.

Saving

If you are working with RPlan without interruption for longer periods, you should save your data at regular intervals. You can never rule out the possibility of a machine crash or the failure of a network connection with resultant loss of data. Click on the *Save* icon from time to time. The data is then saved on the server so that all users have access to the most recent data.

Update

Clicking on the Update button closes all open schedules and reloads them from the database. This ensures that changes made in the meantime by other users are displayed.

Moving activities with the mouse

In addition to using the keyboard, you can edit the schedule bar directly using the mouse. You proceed as follows to move an activity:

1. Position the mouse cursor on the schedule bar. When the cursor is moved over the bar, its shape changes as in Figure 26.

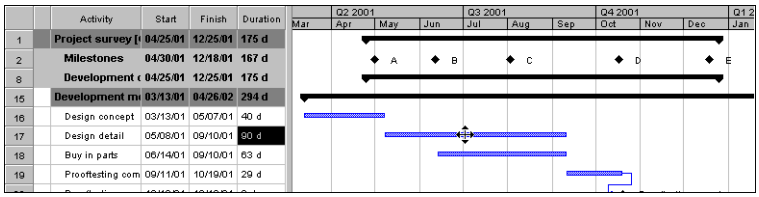


Figure 26: The mouse cursor changes shape when it is moved over the schedule bar

2. Press the left mouse button, hold it down and drag the bar back and forth slightly. A preview bar is attached to the mouse cursor. The preview bar indicates the position to which the activity bar is moved when the mouse button is released. A preview window also displays the move data (Figure 27).

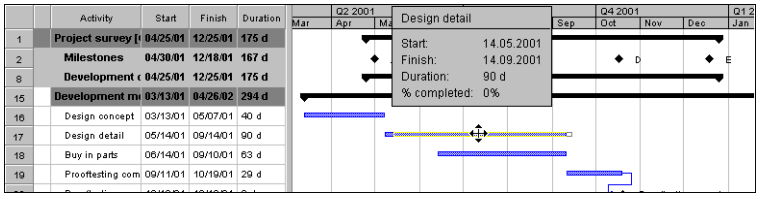


Figure 27: A preview and a data window are shown when the mouse cursor is dragged.

Lag

You didn't succeed in setting a date exactly to the day using the mouse? You should zoom the timescale (see also "Zooming in/out", page 28) to the weekly view, as the start day only moves on a weekly basis if the timescale is coarse.

3. Release the mouse button when the desired start or finish date is shown in the table section.

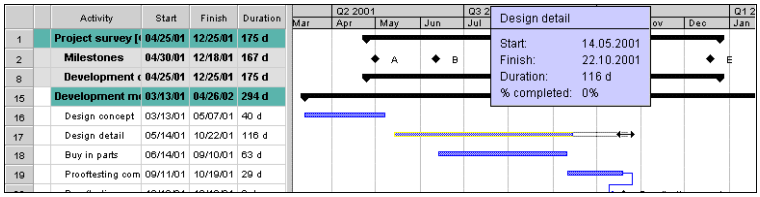


Figure 28: The shifted bar; changing the activity duration by dragging at the end of the bar.

Changing activity duration using the mouse

You can use the mouse to change the activity duration too, as follows:

1. Position the mouse cursor to the end of the schedule bar. The cursor shape changes to that of an arrow (Figure 28).
2. Press the left mouse button, hold it down and drag the bar to change its length.
3. Release the mouse button when the desired start and finish date is shown in the table section.

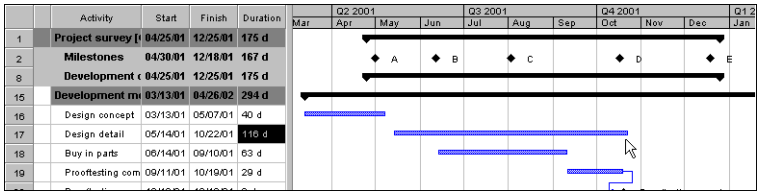


Figure 29: The moved and lengthened "Design detail" activity

Cutting and copying activities

Cut and copy activities as follows:

1. Highlight the row to be copied. To highlight several rows at once, hold down the left mouse button and drag the mouse cursor over the appropriate row numbers (Figure 30).
2. Choose the menu items *Edit* → *Copy* or press the key combination *Ctrl+C*. To cut use *Edit* → *Cut* or *Ctrl+X*.
3. Highlight the activity above which you want to insert the copied rows (Figure 31).
4. Choose the menu items *Edit* → *Paste* or press the key combination *Ctrl+V*.

Do not copy schedules !

You can copy activities but not entire schedules in this way. To copy a schedule, you must first create a new schedule as described in administration (see also documentation RPlan administration) and select the original schedule as a template.

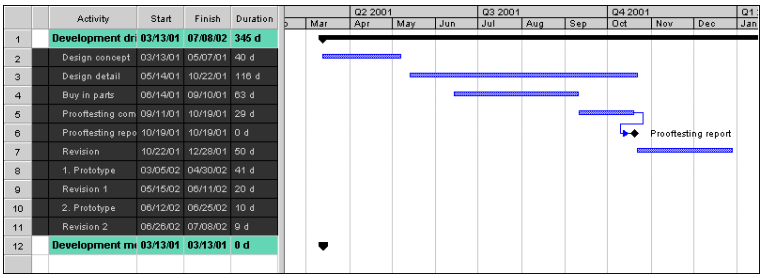


Figure 30: Multiple activity choice

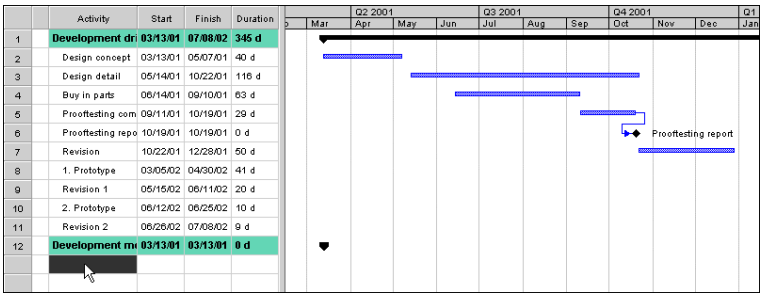


Figure 31: Highlighting the insertion point

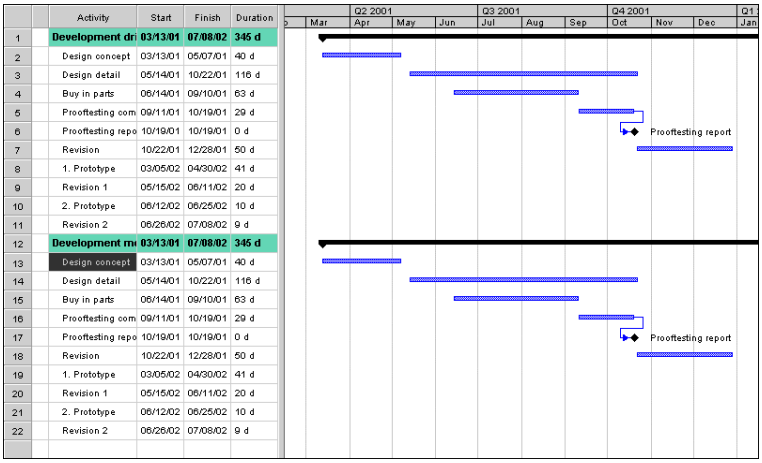


Figure 32: Activities copied from "Development drive" to "Development mechanics"

Structuring schedules by means of summary tasks

Summary tasks enable you to structure activities within schedules. They are shown in bold and indented in the table section. The activities in a summary task are displayed by double-clicking on the row number of the activity (Figure 34).

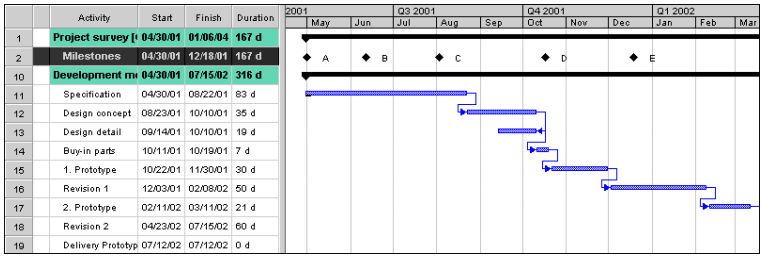


Figure 33: "Milestones" is recognizable as a summary task and it is shown in bold and is indented.

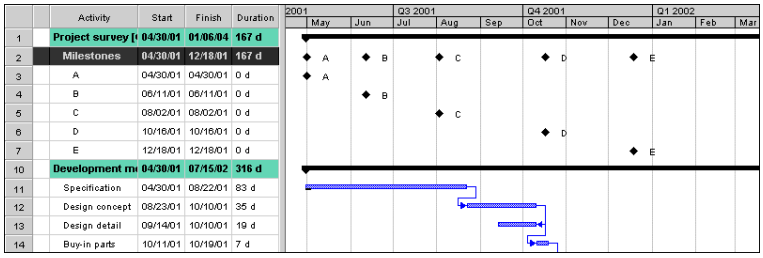


Figure 34: Double-clicking on "Milestones" displays the associated individual activities.

You recognize that "Project start" and the activities "A" to "F" belong to the "Milestones" summary task by the fact that they are arranged below the summary task and are indented. Also, the milestones are included in the Gantt bar chart both in the appropriate row and in the summary task row. By a further double-click on the summary task you can hide the lower-level rows again.

Summary bar and *One Row* display mode

There are two display options for summary tasks in Gantt bar charts:

- *One Row* or
- *Summary Bar*.

In *One Row* display mode, all activities belonging to the summary task are displayed individually in the summary task row (Figure 35). In *Summary Bar* display mode, the individual activities are combined into a single activity bar which shows the total duration of all associated activities.

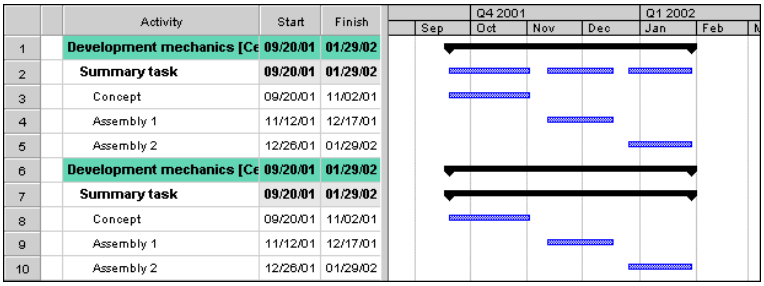


Figure 35: Display of summary tasks in *One Row* mode or as a *Summary Bar*

The advantages and disadvantages of both display modes can be seen in the figure shown:

- One Row display mode only makes sense if the tasks do not overlap in time. However, this mode does allow all associated activities to be displayed in a single row (for example, the milestones in Figure 33).
- By contrast, Summary Bar mode displays only the total duration from the start of the first activity to the finish of the last. Idle times and the duration of individual activities are not shown.

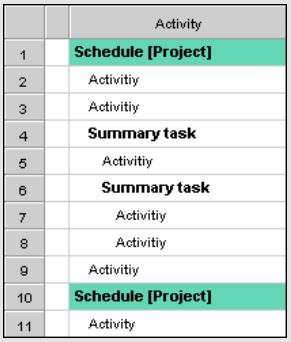
Schedules - summary tasks - activities

Schedule names, summary tasks and activities can be distinguished by the way they are displayed in the table.

Schedule names are in bold but *not* indented and are shown against a green background.

Summary tasks are also in bold but are indented with respect to the schedule name or a higher-level summary task. They can be structured over several levels.

Activities are in standard type and indented with respect to the summary task to which they are assigned.



Creating summary tasks

Summary tasks are generated by grouping existing activities, as follows:

1. First, enter the individual activities you want to group into a summary task and assign activity classes to them (Figure 36).

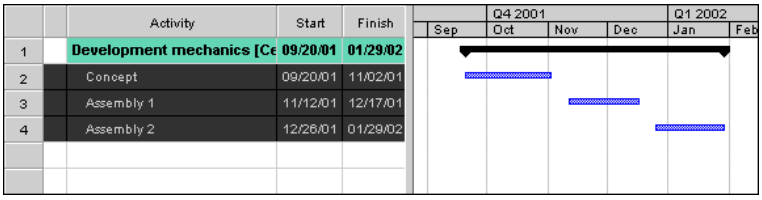


Figure 36: Activities to be combined into a summary task

2. Then highlight the activities to be grouped and click on the *Summary Bar* icon (or the *One Row* icon). This inserts a new row with the name "Summary Task" (Figure 37). The associated activities are indented one level in the table.
3. Highlight the summary task and give it a name.

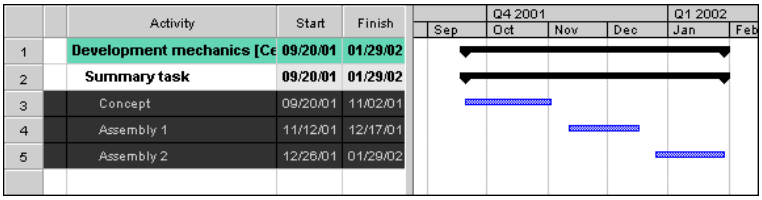


Figure 37: The summary task has been created and the lower-level activities indented.

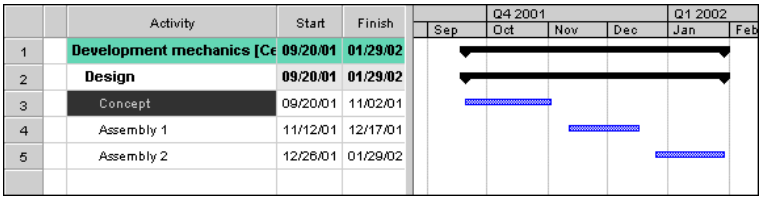


Figure 38: Giving a name to the summary task completes the process.

To hide the lower-level activities, you double-click on the row number of the summary task.

Deleting a summary task

To remove a summary task, you proceed in the same way as for individual activities. Highlight the summary task and click on the *Remove* icon or choose the menu items *Edit* → *Delete*. The lower-level activities are retained and moved up one level.

Brief instructions: Summary tasks

1. To add a summary task, highlight the activities and click on *One Row* - or on *Summary Bar*
2. To show/hide the lower-level activities, double-click on the row number of the summary task

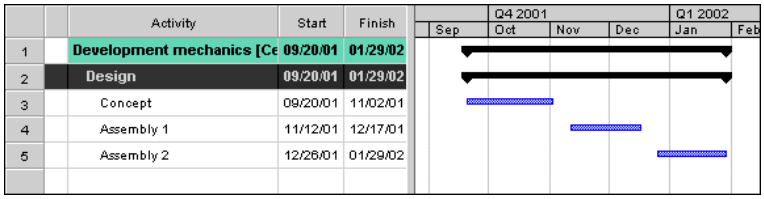


Figure 39: When you delete the summary task, ...

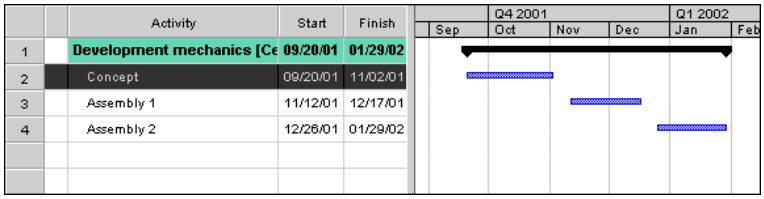


Figure 40: ... the individual activities are retained.

Promoting and demoting activities

Activities can be added to or removed from an existing summary task at a later time. To do this, highlight the relevant activity and click on the *Demote* or *Promote* icon.

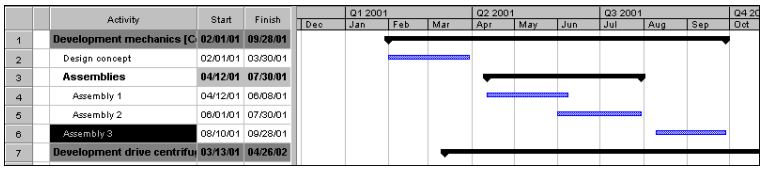


Figure 41: By highlighting "Assembly 3" and clicking on *Demote* ...

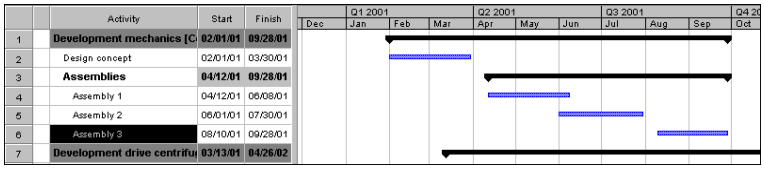


Figure 42: ... you can add this activity to an existing summary task.

If an activity cannot be assigned to a summary task when it is demoted, the activity above it is converted into a summary task. This means that it is then shown in bold and its start and finish dates are set to the total duration of all subordinate activities. The new summary task retains its original activity class.

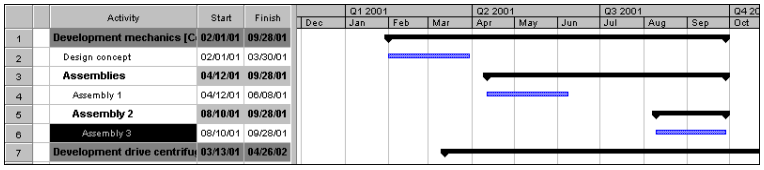


Figure 43: By demoting "Assembly 3" , "Assembly 2" is converted into a summary task.

Similarly, an activity can be removed from a summary task using *Promote*. If it is the only activity assigned to the summary task, the summary task is converted back into a normal activity. It retains the start and finish date it previously had as a summary task.

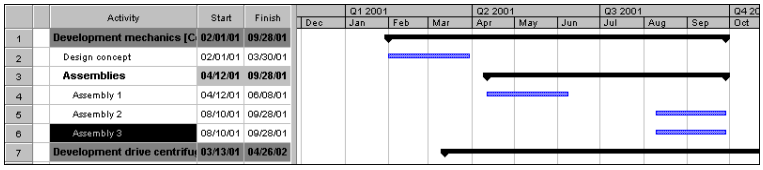


Figure 44: "Assembly 2" is converted back to a normal activity but retains the dates it had as a summary task.

Naturally, entire structures can be promoted or demoted. For example, the relative position of the tasks highlighted in Figure 45 is retained when they are promoted (Figure 46).

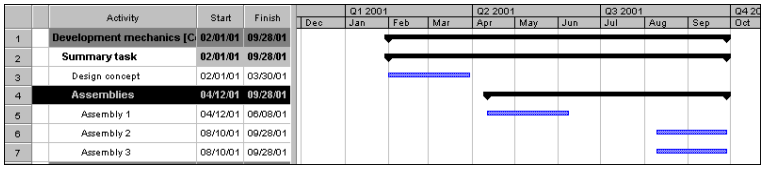


Figure 45: When "Assemblies" is promoted ...

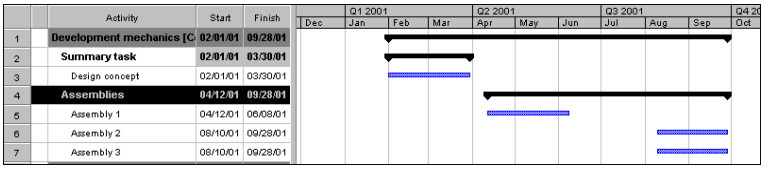


Figure 46: ... the structure within the highlighted tasks is retained.

Showing/hiding outline levels

Depending on whether you are more interested in the total overview of a schedule or in its details, it may be necessary to show or hide lower-level activities. There are various ways of doing this, including the following ways:

- Double-click on the row number of a summary task to show/hide its lower-level activities. When you show them, the next lower level is displayed.
- Highlight a summary task and choose the menu item View → Expand Subtree to show all levels below the highlighted summary task.
- Choose the menu item View → Reduce to First Level to hide all outline levels of a schedule with the exception of the top level.
- Choose the menu item View → Expand All to show all outline levels.

Ease of use through favorites lists

Users of RPlan often need the same schedules for information purposes or need to edit them. Standard combinations of schedules can be stored as custom views in RPlan. As a result, users are no longer forced to repeatedly search for each individual schedule in the project and organization tree. They can open a number of schedules with a single mouse click simply by choosing the required custom view.

Saving favorites lists in the selection dialog

To save a custom view, you must first open the *Select Schedule* dialog box by choosing the menu items *File* → *Open* or by clicking on the *Open* icon. Place all the schedules you want to include in the favorites list in the selection list. Now click on the *Save*-Button

Context menu

Context menus provide appropriate commands for the highlighted objects. Click with the right mouse button on a highlighted object and choose the desired command in the context menu using the right mouse button (Figure 47).

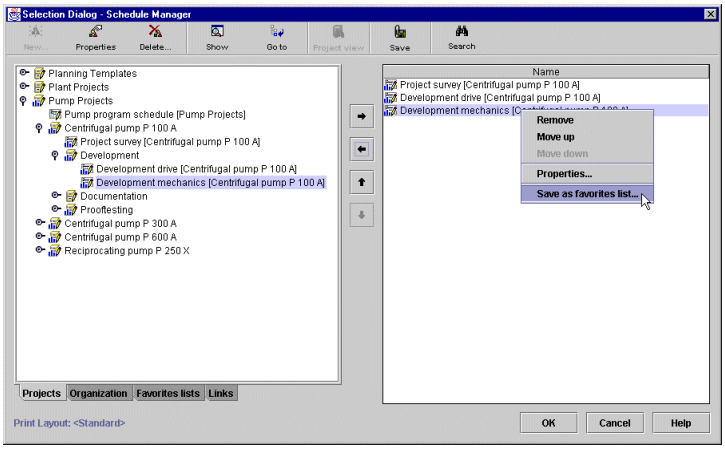


Figure 47: To save a view, choose *Save as favorites list...* in the context menu ...

...

Enter a name for the favorites list in the *New (Favorites list)* dialog box. If necessary, you still have the opportunity to change your schedule selection here using the *Add* and *Delete* buttons and you can change the order of the schedules using the arrow buttons (Figure 48).

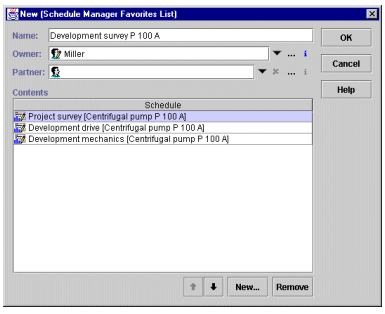


Figure 48: ... and enter a name for your view.

Favorites lists are customized settings available only to their owners and creators. You can however assign a favorites list to a partner, e.g. to a

component supplier. To do this, click on the *Select* icon in the *Owner* field and choose the appropriate person in the organization tree. The partner can see the favorites list with your schedules but cannot change the properties of the favorites list.

Selecting favorites lists

To open a favorites list, choose the *Favorites lists* tab in the selection dialog box, highlight the desired favorites list andclick on the arrow button (Figure 49). All schedules belonging to the favorites list are added and then opened when you click on *OK*.

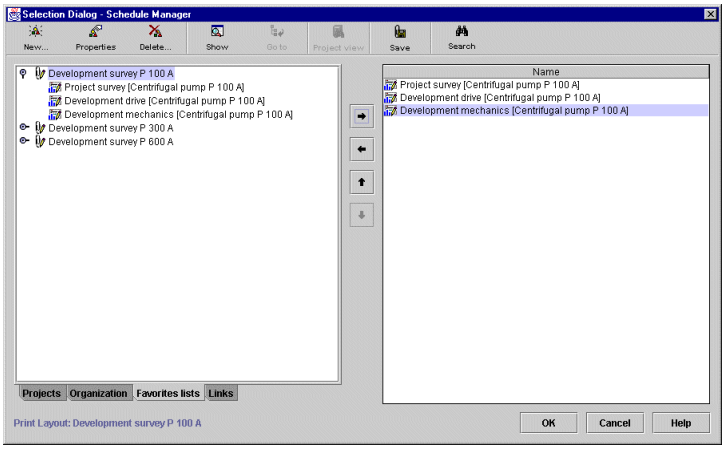


Figure 49: Selecting a favorites list

Changing favorites list properties

The name, owner and contents of an existing favorites list can be changed at any time as follows:

1. Open the *Select Schedule* dialog using the menu items *File* → *Open* or the *Open* icon.
2. Highlight the favorites list to be modified and choose the *Properties* button. You can make the following changes in the *Properties* dialog box (Figure 51):

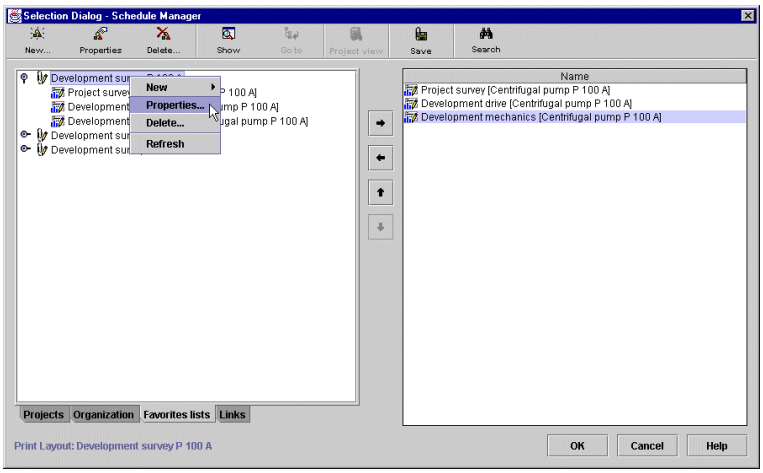


Figure 50: Invoking favorites list properties

Change owner
Click on the selection button in the *Owner* field and choose a new owner in the organization tree.

Add schedule
Click on *New*.

Select the desired schedules in the project tree by moving them to the right into the selection list. Click on *OK* once you have selected all the schedules you want.

Delete schedule
Highlight a schedule in *Contents* and click on *Remove*.

Sort schedules
Highlight a schedule in *Contents* and click on one of the two arrow buttons to move the schedule up or down one position.

3. Confirm your changes with *OK*.

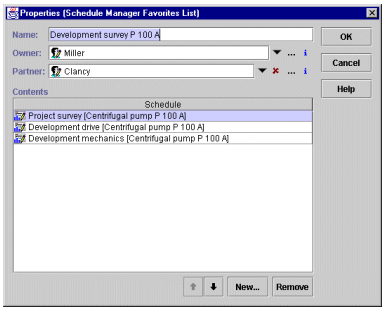


Figure 51: Adding further schedules to a favorites list

Deleting a favorites list

Open the *Select Schedule* dialog box using the menu items *File* → *Open* or the *Open* icon. Highlight the favorites list to be deleted and click on the *Delete* button.

Saving favorites lists in the working view

You are also able to define favorites lists in the working view, i.e. even if schedules are already open. To do so, choose *View* → *Save favorites list*.

You are asked if a new favorites list is to be created (provided your selection has not already been saved as a favorites list). Confirm and enter a name for the favorites list.

If a filter is set when you save a favorites list, it is saved together with the favorites list. When you later re-open the favorites list, the filter is re-applied automatically. You can view the filter criteria associated with a favorites list by choosing *Filter* → *Select* and selecting the entry <*Filter of the current view*> in the *Filter selection* dialog box. Click on the *Properties* button to display the filter criteria (see also "User-defined filters", page 45).

Display options

The following display options can be set using the menu items *Tools → Options:*

- Current Date: Select this option so that the current date is highlighted by means of a colored line in the Gantt bar chart.
- Diagram Rows: If this option is selected, the rows in the Gantt bar chart are highlighted by means of gridlines.
- Row Height: Entering a different value changes the row height.

Saving a user-defined layout

When you exit RPlan, the following layout settings are saved and automatically activated the next time you log in.

- Column widths in the table section
- Position of the screen separator between table section and Gantt bar chart.
- All settings in File → Page Setup
- All settings in Tools → Options
- Interface language

Choose *Tools → System settings* to restore the default layout settings of RPlan.

Simple functions for a better overview

Changing the schedule selection

To add additional schedules to the working view and to remove schedules no longer needed, click on the *Extend/Reduce* icon. You are asked whether you want to save the data you have already edited.

Brief instructions: Changing the schedule selection

1. Click on the *Extend / Reduce* icon.
2. Additional schedules to the right window, schedules not needed to the left window.
3. Sort if necessary.
4. Confirm with OK.

The selection dialog box is shown again (see also "Selecting schedules", page 20). The right window of this dialog box displays all schedules that have been active so far. You can add new schedules by highlighting them in the left window and clicking on the arrow button to move them to the right window. You can also remove schedules by moving them from the right window to the left in the same way. Clicking on *OK* or pressing the *Enter* key immediately updates the working view.

Identifying activities

The following means of identification for activities are available in addition to the activity classes in RPlan. They can be assigned by highlighting an activity and clicking on the appropriate icon. Clicking on the icon a second time deletes the identification.

Private

This has the effect that nobody apart from the owner can see the activity. Private activities are identified with a green *P* at the left of the schedule bar.

Critical

Clicking on this icon identifies this activity as critical. It is highlighted by a red bomb icon next to the schedule bar.

Changed

Clicking on this icon indicates that the activity has been changed. This icon is also situated at the left of the schedule bar.

Completed

The check mark for *Completed* is also situated next to the schedule bar. In addition, a *100% Completed* bar is displayed under the actual activity bar.

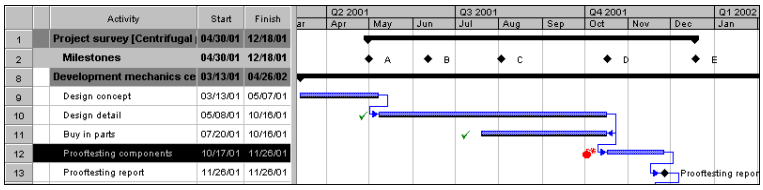


Figure 52: Identifying activities

% Completed

A % completed bar can be assigned to the activity bar to graphically illustrate to what extent an activity has been completed (Figure 52). To do this, move the mouse cursor over the start of the appropriate activity bar. When the shape of the cursor changes to a *Hand*, drag the *Completed* bar to indicate the required degree of completion.

If you want to enter a numerical value for the degree of completion, click on the appropriate activity with the right mouse button and choose *Properties* in the context menu. In the *Properties* dialog box enter the desired value in *% Completed* and click on *OK*. The *% Completed* bar is automatically added to the diagram.

Hyperlinks

Opening files via file://...

Files linked using file://... can be opened automatically by the relevant application from within RPlan Java (e.g. a *.doc file by Microsoft Word) only if RPlan was started from a browser.

Internet Explorer recognizes all files that can be opened in Windows by double-clicking on the file name.

Netscape recognizes all files set under *Edit →Settings → Navigator →Applications*.

In the table RPlan lets you set hyperlinks pointing to further information on an activity in the intranet/Internet. Enter e.g. http://pumpinc.internal/projects/p100a/concept.html for an intranet page of "Pump Company" which contains information on the design concept of pump P 100 A. RPlan automatically recognizes the hyperlink. You need only click on it with the mouse to directly access the intranet page.

The following formats are supported:

- http://... for Internet/intranet pages
- ftp://... for ftp servers
- file://... for any files on your network or local computer system

Excluded from this functionality are the notes field.

Blanks in hyperlinks
If hyperlinks (file names, for instance) contain blanks, they are interpreted only up to the first blank and therefore do not function correctly. To make sure that a hyperlink with one or more blanks functions correctly, you must include the entire hyperlink in double quotes.

		Activity	Start	Finish	Duration	Remark
1		**Project survey [Centrifugal pump**	**04/30/01**	**12/18/01**	**167 d**	**Last change: 07.09.2000**
2		**Milestones**	**04/30/01**	**12/18/01**	**167 d**	
8		**Development mechanics centrifug**	**03/13/01**	**04/26/02**	**294 d**	**Last change: 07.09.2000**
9		Design concept	03/13/01	05/07/01	40 d	http://pumpeinc.internal/projects/p100a/concepts.html
10		Design detail	05/08/01	10/16/01	116 d	vgl. http://pumpeinc.internal/projects/p100a/assemblies.html
11		Buy in parts	07/20/01	10/16/01	63 d	
12		Prooftesting components	10/17/01	11/26/01	29 d	
13		Prooftesting report	11/26/01	11/26/01	0 d	vgl. http://pumpeinc.internal/projects/p100a/prooftests.html

Figure 53: Hyperlinks in RPlan point to further information, e.g. in a corporate intranet.

Standard filters

RPlan features a variety of filter functions to gear the display of planned activities quickly and easily to your information needs. With the help of these filter functions, you can view the data you need on your screen. You have the choice of the following options in the *Filter* menu:

- **Own Tasks** displays only those tasks of which you are the owner and which you are therefore permitted to change. All other tasks are hidden.
- **Critical** restricts display to those tasks identified as Critical.

- **Changed** displays only those tasks identified as Changed.
- **Only Selected Activities** hides all activities not selected. This enables an individualized list of activities to be displayed using multiple selection (Ctrl + left mouse button).

Text and date filters

Type of date filter

You can use the date filter in two ways.


All activities affecting the period: Tasks not entirely within the selected time range are included in the tasks displayed.


Only activities which start or finish in the period: Only those tasks which are entirely within the selected time range are displayed.

Click on the appropriate button to activate the option you want.

The menu items *Filter* → *Text* let you search for text strings. You enter the string you are looking for in *Text* and in *Fields* you can restrict the table columns in which the search is made.

When you click on the *OK* button, only those activities containing the desired string are displayed in the working view. Wildcards are not needed.

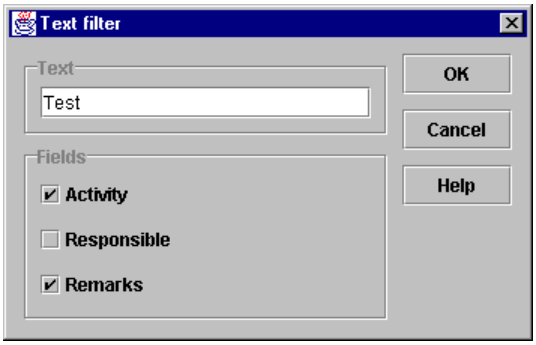


Figure 54: This input searches for the word "Test" in the *Activity* and *Remarks* columns.

The menu items *Filter* → *Date* let you filter activities according to dates. Enter the day after which the desired activities are to begin in *Start*. Enter the day before which the desired activities are to end in *Finish*.

When you click on the *OK* button, only those activities which satisfy one of the two criteria are displayed in the working view.

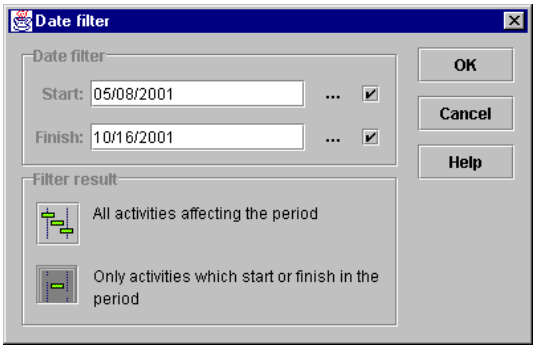


Figure 55: This filters out all activities affecting the period between 08 May 2001 and 16 October 2001.

Remove the filter using *Filter*→ *All Tasks*.

Applying and disabling filters

You show tasks hidden by a filter by choosing *Filter* → *All tasks*. You can also do this using the adjacent button in the toolbar. If a filter is disabled, this button also lets you re-apply the filter last used.

To re-apply the filter last used, choose *Filter*→ *Enable*. You can also toggle between the two options using the adjacent button in the toolbar.

User-defined filters

Displaying associated summary tasks/schedules

Select the *Display associated summary tasks/schedules* option if you want to show the higher-level summary tasks and schedule titles for the filtered tasks. If you do not select this option, only those activities which directly match the filter criterion are displayed.

In addition to providing standard filters, RPlan also allows you to filter the display according to user-defined criteria. To do this, choose *Filter* → *User-Defined Filters*. The filter dialog box lets you define any combination of filter characteristics (Figure 56).

1. Select the first filter criterion in *Characteristics*. Define a *Condition* and enter the desired value.
2. Click on the *Add* button to add the filter criterion to the filter list.
3. If necessary, repeat steps 1 and 2 to add further criteria to the filter list.
4. Select one of the options "And" or "Or" under *Logic operation on filter criteria*. All criteria contained in the filter list are applied in combination.

AND / OR

Depending on what logic operator you have chosen under *Logic Operation* on *Filter Criteria*, the criteria contained in the filter list will be combined in different ways:

In the case of *Or*, all activities which satisfy one criterion will be displayed (Figure 59).

In the case of *And*, only those activities are displayed which satisfy all criteria simultaneously (Figure 58).

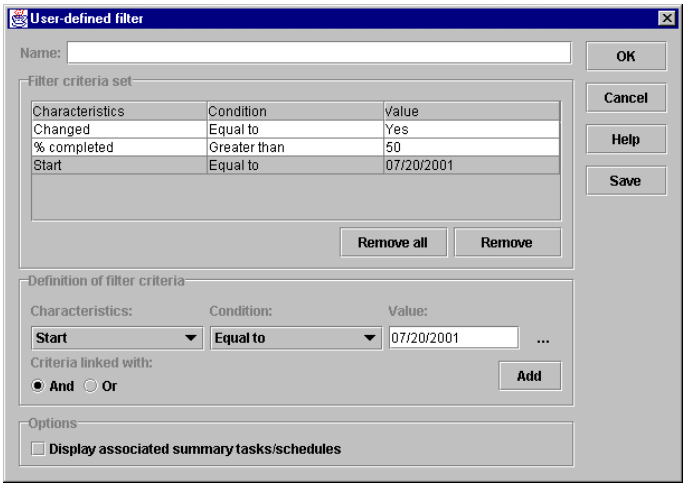


Figure 56: The dialog box for user-defined filters

If you wish to delete all the selected criteria from the list, click on the *Remove All* button. If you want to delete individual criteria, highlight them and click on the *Remove* button.

To subsequently change a criterion which already appears in the list click on *Remove* again. The criterion appears under *Logic operation on filter criteria* where you change the settings and again choose *Enter*.

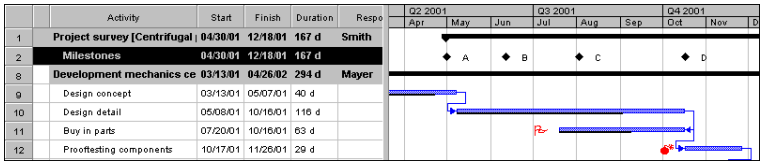


Figure 57: If the filter combination defined in Figure 56 is applied to this initial situation ...

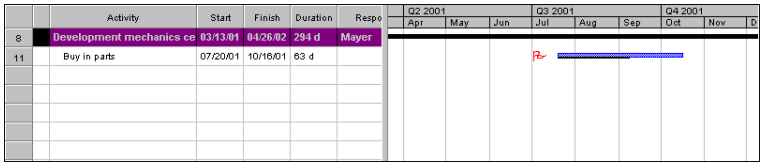


Figure 58: ... this is the result because only the "Buy-in parts" activity satisfied all three criteria at the same time. If the criteria were linked with the logical operator *Or* ...

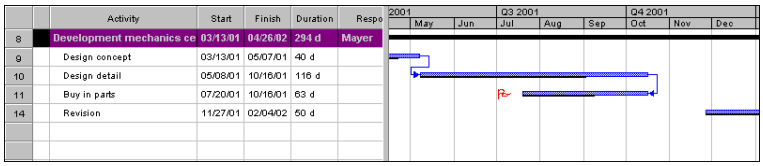


Figure 59: ... the result would show all activities which satisfy at least one of the criteria.

Saving filters

Public filters

Public filters are saved by the system administrator and made available to all users. In the selection dialog box you can distinguish them from user-defined filters by means of the release icon.

Public filters are defined in the same way as user-defined filters. The only difference is that the administrator is provided with an additional checkbox labeled 'Public filter'.

You can save your own, user-defined filters. To do this, you define a filter and enter a name for it in the *User-defined filter* dialog box and then click on *Save* (Figure 56). The filter is applied and saved with the name you entered. This enables you to draw up and manage your own list of individual filters.

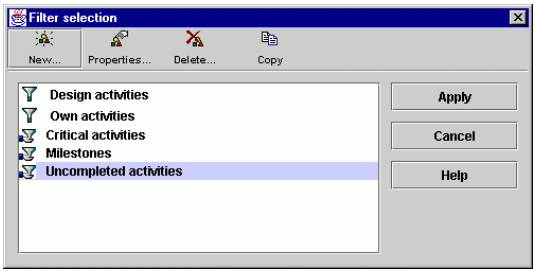


Figure 60: The filter selection

To call a filter you have already saved, choose *Filter* → *Select*. You are shown a selection dialog box with all the filters you have defined and the system-wide filters provided by the administrator (Figure 60). Select the desired filter and click on *Apply* to use it (alternatively double-click on the filter).

Editing saved filters

Editing public filters

Only the administrator is allowed to change public filters. If you need a modified version of a public filter, first copy the filter and then make any changes you require.

Proceed as follows to edit a saved filter.

1. Choose *Filter* → *Select*.
2. Select the filter you want to change and click on the *Properties* button. The *User-defined filter* dialog box opens.
3. Change the filter criteria and click on *OK*. This saves your changes.

Proceed as follows if you want to check the filter before you save your changes.

1. Choose *Filter* → *Select*.
2. Double-click on a filter to apply it. The dialog box is closed and you see the filter result in the bar chart.
3. Choose *Filter* → *User-defined filter*.
4. Change the filter criteria and click on *Apply*. You can now check the filter result without saving your changes.
5. When you are ready to save the filter, you again choose *Filter* → *User-defined filter* and click on the *Save* button.

Copying filters

Proceed as follows to copy a saved filter.

1. Choose *Filter*→ *Select*.
2. Select the filter you want to copy and click on the *Copy* button. The *User-defined filter* dialog box opens.
3. You can now change the name or the filter criteria if you want.

Click on *OK*. You now see the copied filter in the filter selection.

Deleting filters

Choose *Filter* → *Select* to delete your own filters. Select the filter you want to delete, click on the *Delete* button and acknowledge the prompt for confirmation.

Task notes

Tasks notes can be appended to activities in order, for example, to document the reason for a schedule change. To do this, highlight the appropriate activity and click on the *Notes* icon or double-click on the cell before the activity name.
Then enter your additional information in the input dialog box and click on *OK*.

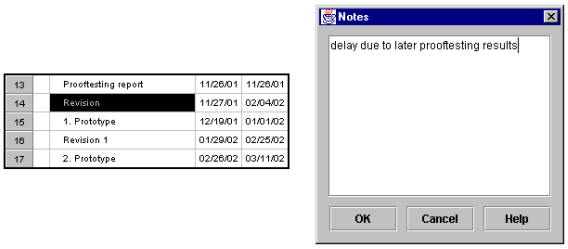


Figure 61: "Revision" activity with task note and *Task Notes* input dialog box

Activities with task notes are identified by a "notes" icon in the first column of the table. For printing out task notes refer to "Page setup" on page 73.

Adjusting dates

The *Adjust Dates* function allows you to move, in a single operation, whole groups of activities by a certain period without the activities being linked.

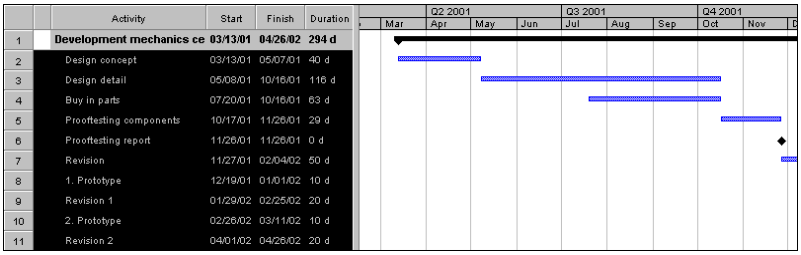


Figure 62: The highlighted activities are moved so that their start date ...

1. Highlight all activities to be moved and choose *Tools* → *Adjust Dates.*
2. In *Type* specify whether you want to adjust the start or finish date.
3. Enter the new date.

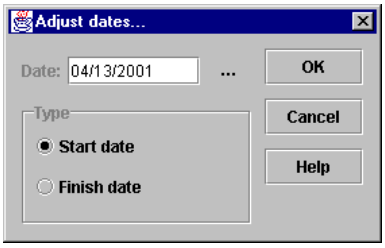


Figure 63: ... is 13 April 2001.

The start date of the earliest activity in Figure 62 is March 10, 1999. To move the whole chain of activities so that the start date is April 15, 1999 (the sequence of activities remains unchanged), you must enter this date as the new start date. The relative offsets between the activities remain unchanged. Figure 64 shows the moved activities.

Brief instructions: Adjusting dates

1. Highlight the activities.
2. Choose *Tools* → *Adjust Dates*.
3. Enter the desired start/finish date.
4. Choose the date type.
5. Confirm with *OK*.

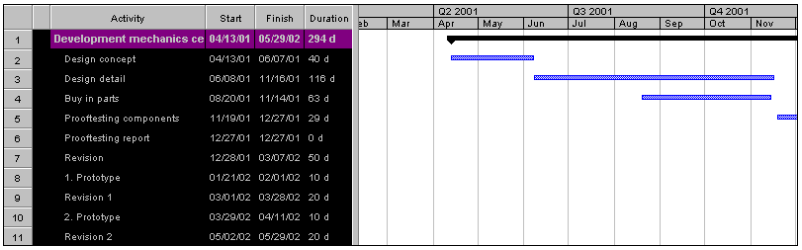


Figure 64: The same activities after the new start date has been set

Constraint types and activities that cannot be edited

The following activities are not moved when adjusting dates, even if they have been selected::

- Foreign activities
- Schedule names
- Active Link requests from other users in your schedule (see also "Creating Active Links", page 57

For the constraint types *Fixed* and *Deadline*, the *Adjust Dates* function behaves as follows

- *Fixed:* The activity is moved and is given the constraint type *Fixed* for your new date.
- *Deadline:* The deadline is set to the new end date if it is later than the original deadline. Otherwise, the original deadline is retained.

Target/actual comparison

All tasks / only activities not set

There are two ways of setting a baseline status:

- *Only Activities Not Set* sets the baseline status only for those activities for which no baseline status has been previously set.
- *All Tasks* overwrites the baseline status of all activities with the current status.

The current planning status can be stored at any time as a baseline for later target/actual comparisons, as follows:

1. Choose *View* → *View Type* → *Target/Actual Data* to go to the target/actual view.
2. Choose *Tools* → *Set Baseline Status* → *All Activities* or *Only Activities Not Set* to assign a second bar in the form of a target bar to each activity (Figure 65). If the dates are now moved, the difference between the two bars will graphically illustrate the divergence from the baseline status.
3. Choose *View* → *View Type* → *Standard* to go back to the normal view without a target/actual comparison.

Brief instructions: Target/actual comparison

1. Set the current status as the baseline status using *Tools* → *Set Baseline Status.*
2. Target/actual comparison using *View* → *View Type* → *Target/Actual Data*
3. Normal view via *View* → *View Type* → *Standard*

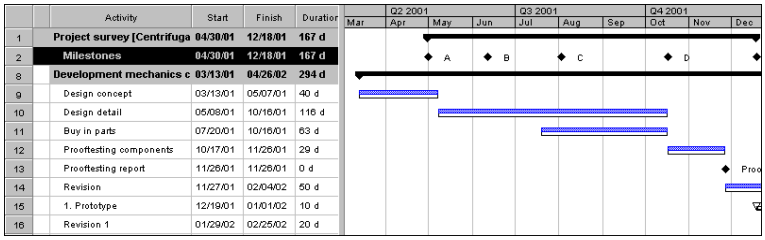


Figure 65: Target/actual comparison directly after setting the baseline status

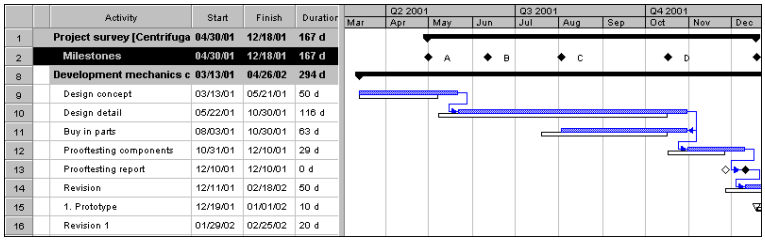


Figure 66: Changed status after moving several activities.

Language versions

In the Java user interface of RPlan you can choose whether you want to work in German or English. To do this, select *Options* in the *Tools* menu and then set the appropriate language in the *Languages* pulldown menu. The *UK English* and *US English* options differ in their date format.

Actively networking projects

The various activities of a schedule and the different schedules displayed in the project tree are interdependent in terms of time and content. These interdependencies must be mapped in order to reflect the realities of project planning. With this in mind, RPlan provides three types of link:

- **Autolinks** allow activities to be linked within a schedule. The owner of the schedule can thus help automate planning operations. If an activity is moved, the linked activities are also automatically adjusted accordingly.
- **Synchrolinks** allow the owners of schedules to make their activities dependent on the activities of other users. If moving a predecessor results in conflicting dates, RPlan informs the user. Owners can then decide if an automatic adjustment is to be made or whether manual corrections are to be carried out.
- **Active Links** allow users to coordinate by enabling them to request activities from other project members on specific dates. The project members involved are informed accordingly by the system and can then accept, modify or reject

the request. This ensures that project dependencies are communicated and that relevant agreements are documented, thus promoting a cooperative style of project management.

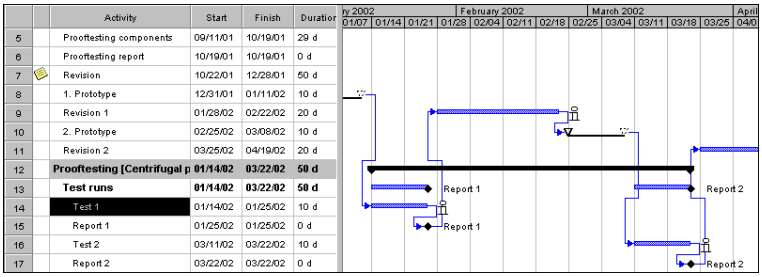


Figure 67: Example of linked activities

Linking within a schedule – Autolinks

Scope

Autolinks may be defined only within a schedule. Synchrolinks are available as cross-schedule links.

The sequence of activities within a schedule can easily be kept under control by means of Autolinks. To do this, you proceed as follows:

1. Move the mouse cursor over the earlier of the activities to be linked (Figure 68).

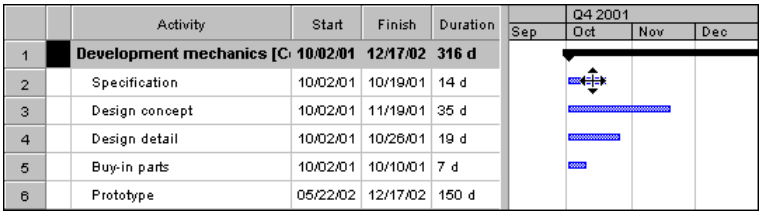


Figure 68: Creating a link ...

2. Hold the left mouse button down and drag the mouse cursor to the later of the activities to be linked. The schedule bar of the second activity is shown in changed form when the cursor moves over it (Figure 69). Now release the mouse button. Both activities are now linked by means of an arrow.

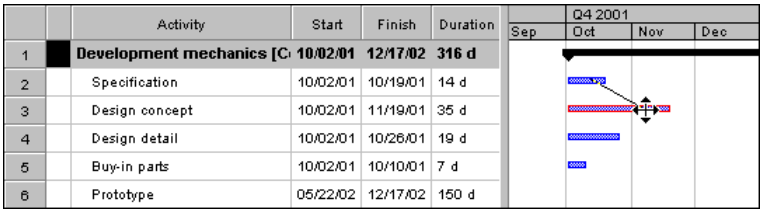


Figure 69: ... within a schedule

4. The later of the two activities is automatically arranged so that it starts one day after the earlier activity finishes. To define a different ruling for the Autolink, drag the link with the right mouse button. When you release the button, you are shown a context menu in which you select the link type.

   To subsequently change the link type, double-click on the link arrow and set the *Type* or *Lag* options to suit your needs (Figure 70).

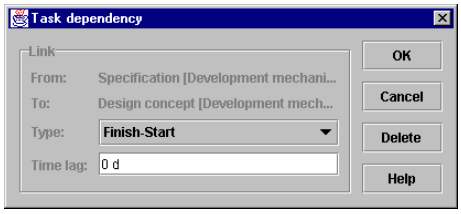


Figure 70: Setting Autolink properties

Autolink properties

Type: Here you set how the activities are to be linked to each other.

- *Finish-Start*: The successor must start on the day (+ lag) after the predecessor finishes.

- *Start-Finish*: The "successor" must finish on the day (+ lag) on which the "predecessor" starts.

- *Start-Start*: The successor must start on the day (+ lag) on which the predecessor starts.

- *Finish-Finish*: The successor must finish on the day (+ lag) on which the predecessor finishes.

Lag: Here you enter a float in days between the linked activities. A negative number causes the activities to overlap.

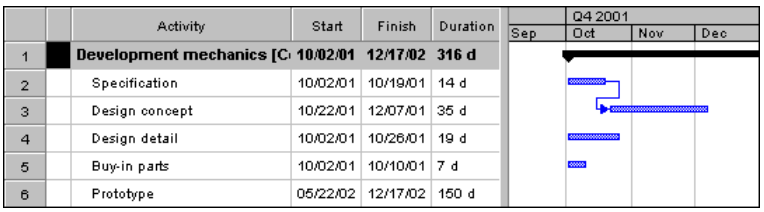


Figure 71: The created link

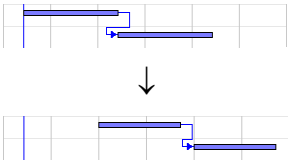
Alternatively you can generate Autolinks using the menu. To do this, select two or more activities to be linked and choose *Links* → *Link tasks*. The tasks are linked in the sequence in which they were selected. You can break links using *Links* → *Unlink tasks*.

Constraint types when linking

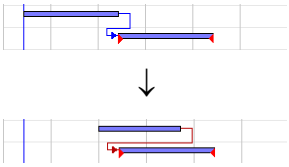
Depending on the type of activity constraints in a project, it is desirable to specify different types of behavior for the schedule bars when linking is performed. For example, milestones should not normally be adjusted automatically when a predecessor is moved as milestones are considered as fixed dates. For other activities there is a defined latest completion date (deadline) which must not be changed. It is therefore advisable not to make automatic adjustments if this completion date is exceeded.

For this reason, each activity can be assigned a constraint type which affects the behavior of the activity. The following constraint types are available:

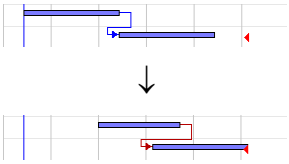
- **Variable** means that the activity is automatically adjusted if a change is made to its predecessor.



- **Fixed** means that the activity is never automatically moved when a predecessor activity is changed. Conflicting dates are shown by means of a red link arrow. Activities with constraint type *Fixed* are identified by a red triangle at the beginning and at the end of the schedule bar.



- **Deadline** means that the activity behaves like a variable activity providing the deadline is not exceeded. Conflicting dates are shown by means of a red link arrow. The deadline is identified by a red triangle.



You define constraint types as follows:

1. Click with the right button on the activity in the table section and choose *Properties* in the context menu.
2. In the pulldown menu select the constraint type under Constrain Task

Brief instructions: Autolink

1. Drag the link between bars within a schedule using the mouse.
2. If necessary, double-click on the link arrow to set constraint type and lag.

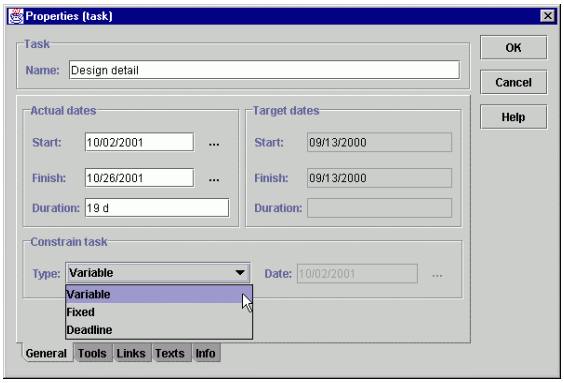


Figure 72: Setting the constraint type

3. For the constraint type *Fixed* you enter the date that must not be exceeded in the *Date* field. (This field does not accept input in the case of all other constraint types).
4. Click on *OK* to close the *Properties* dialog box.

Cross-schedule linking – Synchrolinks

Brief instructions: Synchrolink

1. Drag link from foreign to own activity.
2. If necessary, double-click on link arrow to set constraint type and lag.
3. Open an associated foreign schedule using *Links* → *Expand* or by double-clicking on "i".
4. Adjust activity using *Links* → *Synchrolink Properties* and the *Adapting* button or by clicking on "i" with the right mouse button and then choosing *Adjust Activity*.

Synchrolinks allows you to stay informed at all times of whether the activities of other project members on which your planning depends have changed. You simply link the "foreign" predecessor activity with a successor activity (not vice-versa) in your schedule using drag-and-drop in the same way as you would create an Autolink.

The successor is automatically assigned the constraint type 'fixed'. This prevents an Autolink from taking precedence over the Synchrolink if dates are shifted (cf. "Adjusting Synchrolinks" on page 56).

Likewise, you can change the properties of Synchrolinks, i.e. the link type and lag, by double-clicking on the link arrow.

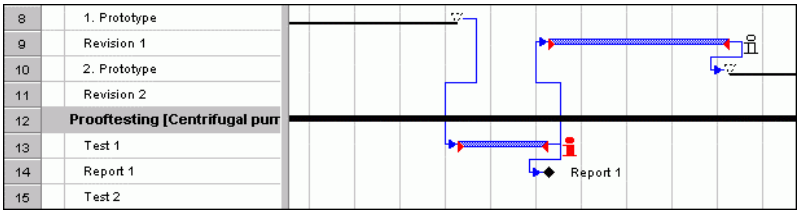


Figure 73: Synchrolinks across schedule boundaries. The dependent activity is identified by means of an "i" icon.

However, Synchrolinks behave somewhat differently to Autolinks as they are cross-schedule links. Their activities are assigned an icon in the form of an "i" in addition to the link arrow. This indicates that there is a Synchrolink (or an Active Link see below) to the activity, even if the associated foreign schedule is not open.

Links in schedules which are not open

Depending on situation, the "i" icon is shown in various forms which have the following meanings:

Hollow black i: All schedules in which there is a link to the activity are already open. There are no conflicting dates.

Solid black i: The activity is linked in schedules which are not open. Double-clicking on the "i" opens them. There are no conflicting dates.

Hollow red i: All schedules in which there is a link to the activity are already open. There is at least one conflicting date.

Solid red i: The activity is linked in schedules which are not open. Double-clicking on the "i" opens them. There is at least one conflicting date.

Each time you log in again to RPlan, you automatically receive a message if a foreign schedule has been changed thus causing a date conflict for one of your Synchrolinks. The link tab in the selection dialog box shows you which links are involved. You can then load the relevant schedules from there (see also "Overview of all Active Links and Synchrolinks", page 64).

Expanding Synchrolinks

If there is a Synchrolink in a schedule which is not open, it can be displayed as follows:

1. Select the relevant activity and choose the menu command *Links* → *Expand*. In the Java user interface there is a simpler option: .Double-click on the "i" associated with the bar or choose *Expand* in the context menu of the "i"(Figure 74).
2. If several schedules are involved in the link, you are shown a selection box in which you choose the schedule to be opened. If you want to open more than one schedule, hold down the *Ctrl* key and highlight the desired schedules.

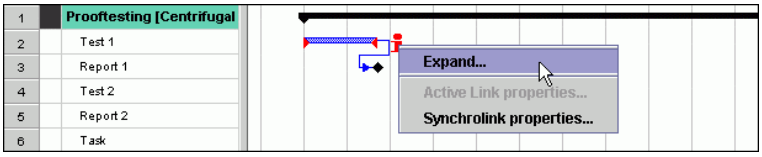


Figure 74: Expanding a Synchrolink

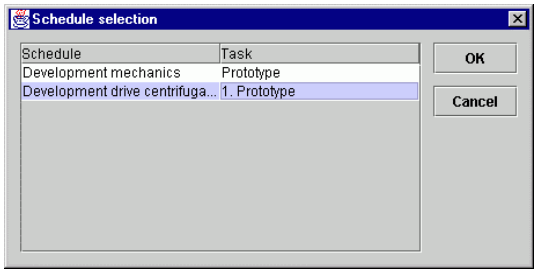


Figure 75: The selection list of the schedules to be expanded

3. Confirm your choice with *OK*.

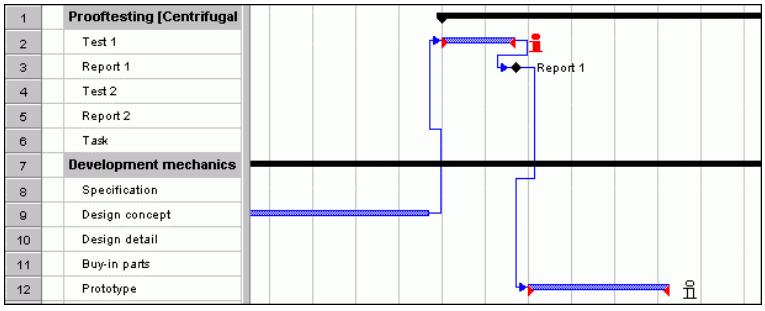


Figure 76: The schedule shown in Figure 74 after it has been expanded

Adjusting Synchrolinks

Constraint types for Synchrolinks

As for Autolinks you can define link types, constraint types and lag for Synchrolinks. These settings are taken into account when displaying the link arrows and "i" icons in red or black. Synchrolinks behave in the same way as Autolinks when they are automatically adjusted.

There are two ways of responding to date conflicts involved in Synchrolinks. You can adjust your schedule manually to suit the new circumstances. This method has the advantage that you retain full control over the changes in your schedule. Alternatively, as with Autolinks, you can have your own schedule automatically recalculated and adjusted as a function of the Synchrolink involved.

Click with the right mouse button on the link arrow and choose *Adjust Activity* in the context menu. As in the case of Autolinks, the following activity is recalculated and moved.

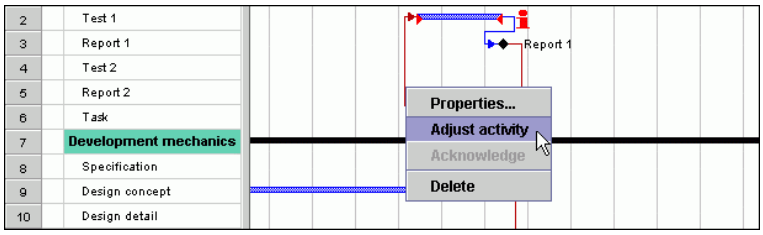


Figure 77: Clicking on *Adjust Activity* recalculates a Synchrolink...

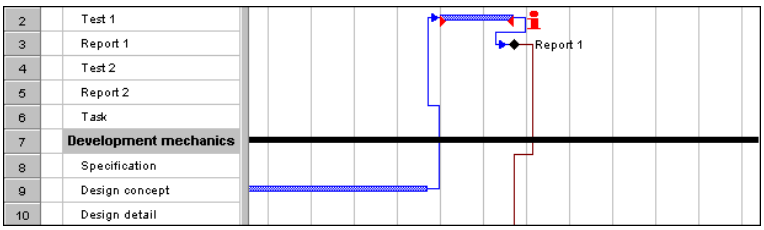
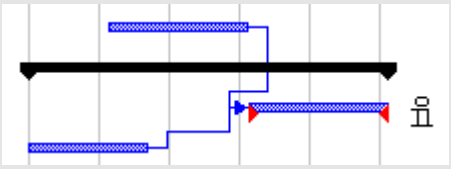


Figure 78: ... and moves it accordingly.

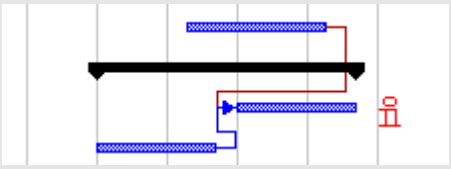
Combination of Autolinks and Synchrolinks

If a task is the successor of an Autolink and also a Synchrolink, you must decide whether you want the Autolink to be adjusted automatically or whether you want to process the Synchrolink manually:

- If you choose *Adjust Synchrolink,* the task is automatically assigned the constraint type *Fixed.* As a result, the Autolink can no longer trigger automatic adjustment.



- You can choose *Adjust Autolink* only if the constraint type of the successor is *Fixed.* Adjusting an Autolink causes the constraint type to be changed to *Variable.* As a result, Autolink adjustment is automatic.



Project-wide coordination - Active Links

Brief instructions: Active Link

1. Issue a request using *Links* → *Create Active Link.*
2. Select the supplier.
3. If necessary, change the request date using *Change* in the *Properties* dialog box.
4. Open an associated foreign schedule using *Links* → *Expand* or by double-clicking on "i".
5. React to Active Link change using *Links* → *Active Link Properties* and Toolbar in the *Properties* dialog box.

Simply mapping dependencies and making isolated responses in your own schedules is not sufficient to guarantee efficient project planning and control. Direct communication and coordination between the members of the project team is also important. This can be achieved directly in the RPlan system by means of Active Links.

The starting point of an Active Link is always an existing milestone for which a preliminary activity is to be performed by another project member. A project partner can request completion of this activity on a specific date by means of an Active Link. The supplier of the preliminary activity is notified and can respond to the request by confirming the completion date, changing it or rejecting it. This is reported back to the requesting partner who replies in turn. Finally, an agreement is reached on the dependency between both activities and this is documented in RPlan.

Creating Active Links

You create Active Links as follows:

1. Select the milestone for which you want to request a service. Choose the menu command *Links* → *Create active link* (Alternatively in the Java user interface. Click the right mouse button on the milestone and choose *Create active link* in the context menu, Figure 79).

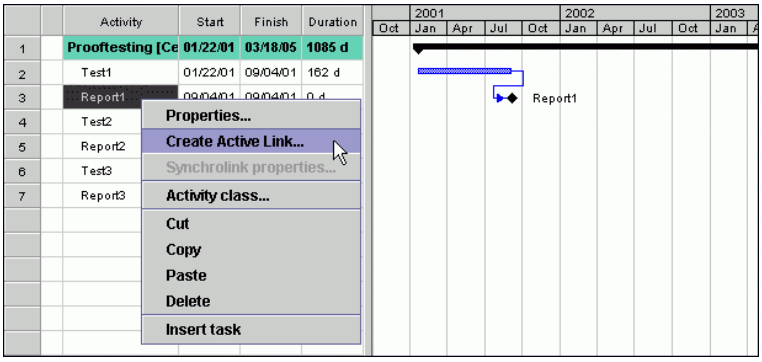


Figure 79: Creating an Active Link using the context menu.

2. In the *Active Link Properties* dialog box you enter a title for the requested preliminary activity. The data of the originating activity is displayed directly below the title in *Requester* (Figure 80).

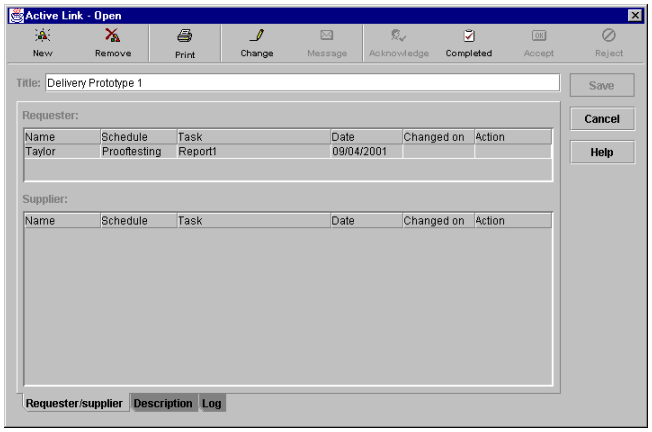


Figure 80: Definition of the Active Link

Selecting a supplier

You can select the supplier for an Active Link using either the project tree or the organization tree or the list of views. Choose the appropriate tab in the selection dialog box.

When you select a schedule, you define the owner of the schedule as the supplier. Not only is the supplier informed by means of a message but a milestone with the title of the Active Link is set in the schedule.

When you select a user, only a message is sent (no milestone is set). The supplier can then select a schedule to which the Active Link is assigned.

3. Click on the *New* button. In the selection dialog box choose a schedule or a user to which/whom the Active Link is to be assigned. Confirm your choice with *OK* (Figure 80)

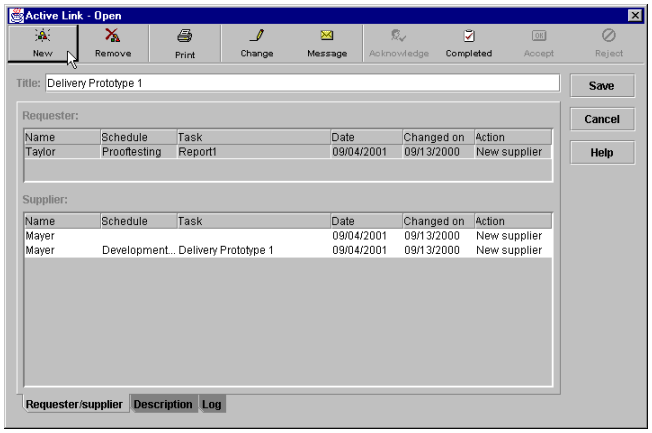


Figure 81: The supplier(s) is (are) shown in the lower list box (left). The second tab allows you to enter an explanatory text on the Active Link.

4. If necessary, switch to the *Description* tab to append an explanatory text to the request.

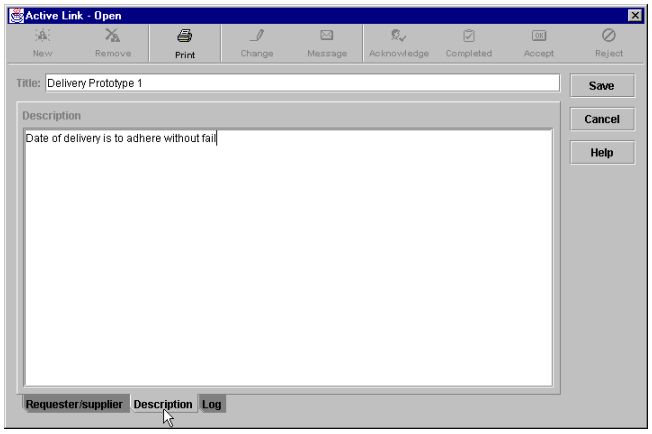


Figure 82: The second tab allows you to enter a description.

5. The date of the underlying milestone is automatically used as the requested date. If you want a different requested date, highlight the requestor row and choose *Change*. Now enter a new requested date in the *Active Link (Change)* dialog box.

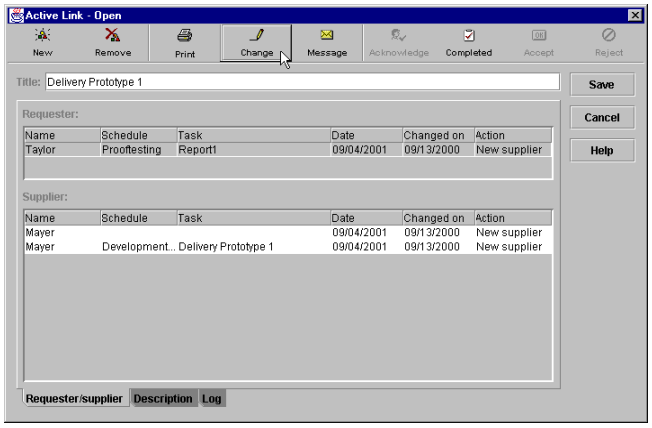


Figure 83: Editing a request

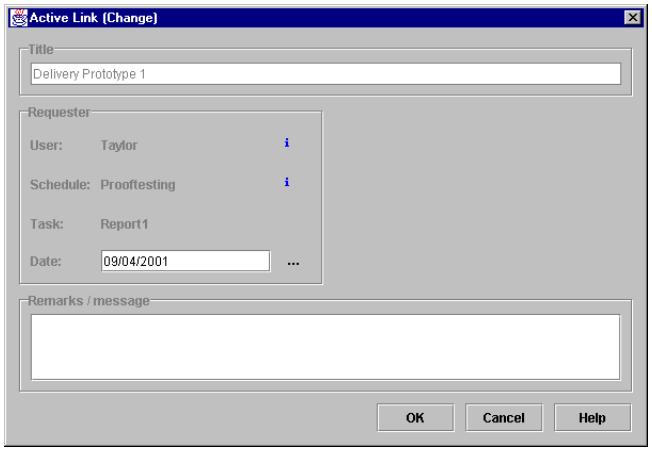


Figure 84: Entering a new requested date

6. Confirm your input with *OK*. If you want to inform your partners about the new Active Link by e-mail , confirm the prompt that now appears. This

automatically generates and sends e-mails (see also "E-mail notification", page 65).

As in the case of Synchrolinks, an "i" symbol is assigned to your activity. The schedule to which the Active Link points can be opened by clicking with the right mouse button on the "i" and then choosing *Expand* in the context menu (providing you have selected a schedule and not just a user as supplier). If there are several Active Links to the activity, you are first offered a selection list containing the linked schedules. If the two schedules are open, the Active Links are represented as dotted link arrows in black or, if there is a date conflict, in red.

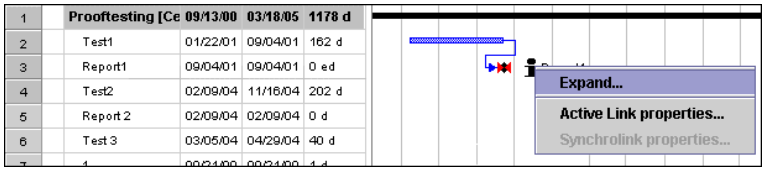


Figure 85: Opening a linked schedule by expanding an Active Link

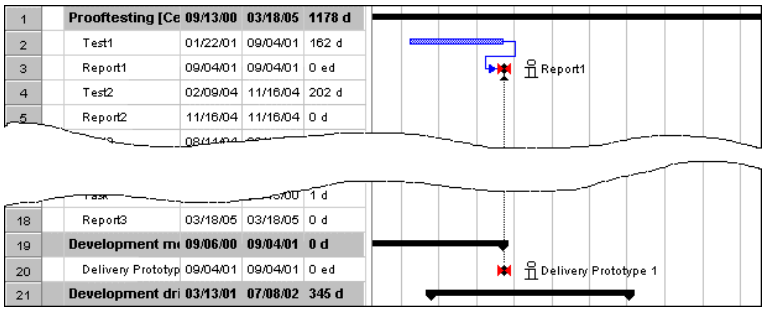


Figure 86: The Active Link creates a milestone in the supplier schedule (below) which is linked to the originating activity by means of an arrow.

The fact that an Active Link request exists is also clearly indicated at the supplier end. If the Active Link was addressed to a supplier schedule, a milestone with the title of the Active Link appears in this schedule, identified by the "i" icon. The next time the supplier logs in to RPlan he/she receives a message indicating that there are new requests to which a response is required.

Responding to an Active Link

Edit an Active Link as follows in order to respond to a request or to change a requested date:

1. Open the *Properties* dialog box for Active Links. There are various ways of doing this.
   - In the *Selection* dialog box you click on the Active Link with the right mouse button and choose *Properties*.
   - In an open schedule you click with the right mouse button on the "i" icon and choose *Links → Active Link Properties*.
   - In the opened schedule click with the right mouse button on the "i" and choose *Active Link Properties*. If more than one Active Link is linked to the activity, you are first shown a list of Active Links in which you make your choice.
   - Double-click on the dotted arrow of the Active Link.
2. In the *Properties* dialog box highlight the entry to be edited (Figure 87). The top line shows the task from which the Active Link originates. The list below it shows all suppliers to whom the Active Link was addressed. Only entries for the current user can be changed.

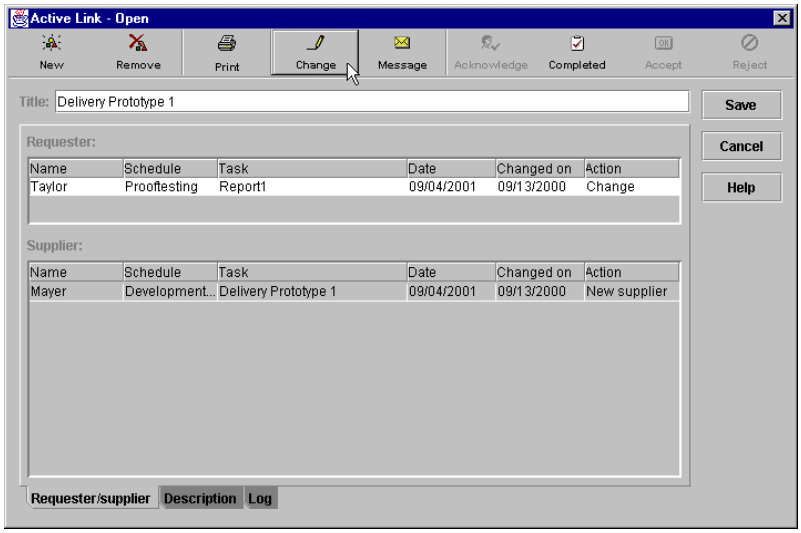


Figure 87: In this example a request was addressed to the user "Mayer" with a target date of September 4, 2001. To propose a different target date, Mayer must highlight the supplier entry and choose *Change*.

3. You can respond to an Active Link in various ways.
   - Change
   - Message
   - Reject
   - Accept
   - Completed

   Choose the appropriate button on the toolbar in the *Active Link properties* dialog box. These buttons are available or grayed out depending on the particular situation. For example, it would make no sense if requesters were able to accept their own Active Links.

4. An edit dialog box opens for the Active Link (Figure 88). It contains full information on the link from the requester (left) and the supplier (right). Make any desired changes here. All fields which you are not authorized to change are disabled. One example of this is the title which may be changed by the requester but not by the supplier. Confirm your input with *OK*.

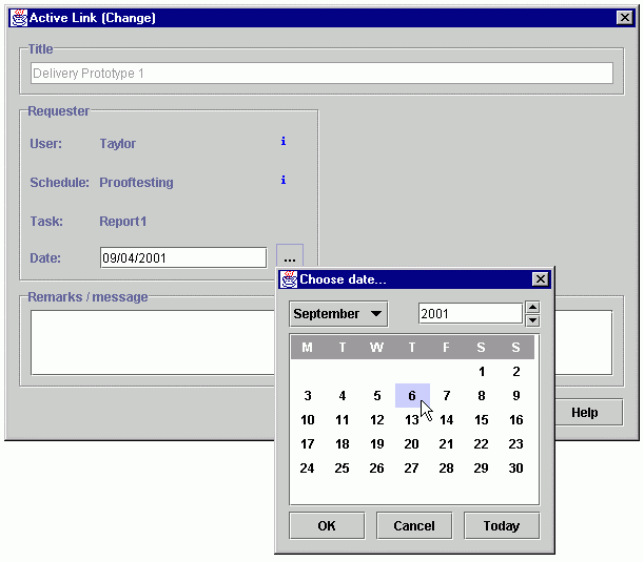


Figure 88: User "Taylor" is permitted to make changes in the edit dialog box for the Active Link on the supplier side only.

Date changes

Note the following if you, as the supplier, change the target date:

The milestone created in your schedule by the Active Link does **not** change its position as a result of the date change. Its only purpose is to show you the date required by the requester. Your changed date (a later date) is indicated by the red coloring of the "i" icon so that the date conflict is clearly visible.

5. You are now in the *Properties* dialog box again. On the *Log* tab you will notice that your actions and all previous actions have been logged in a list. Double-click on an entry to display the full text.
6. Click on *OK* to close the *Properties* dialog box.

Deleting an Active Link

When deleting an Active Link, you should note that there is a difference between deletion by the requester and deletion by the supplier. Only the requester can completely delete an Active Link. The supplier has only the option of deleting his/her part of the link, but cannot remove the request itself.

Requester side
The requester can either remove the request for one of several suppliers or delete the complete Active Link for all suppliers.

1. Select the relevant activity.
2. Open the *Properties* dialog box for Active Links using *Links* → *Active Link Properties.*
3. Select one of the supplier entries to remove it, or select the requester entry to delete the entire Active Link.
4. Click on the *Delete* button and respond with *Yes* to the confirmation prompt. Click on *OK* to close the dialog box.

As far as the requester is concerned, the Active Link is now deleted. However, for the supplier the Active Link remains visible and is marked as deleted in the *Properties* dialog box. Clicking on the *Acknowledge* button deletes the Active Link for the supplier as well. The supplier milestone remains as a normal activity in the schedule of the supplier and can now be deleted.

Supplier side
The supplier can delete his/her part of an Active Links by rejecting the request.

1. Select the relevant activity.
2. Open the *Properties* dialog box for Active Links using *Links* → *Active Link properties.*
3. Select your supplier entry.
4. Click on the *Reject* button.
5. A further dialog box opens in which you can enter a comment or reason for rejection in *Remarks/Message.*
6. Close this dialog box and then the *Properties* dialog box by clicking on *OK.*
7. This converts the supplier milestone into a normal activity which can then be deleted from the schedule.

As far as the requester is concerned, the Active Links remains visible and is marked as rejected in the *Properties* dialog box. The requester can then either delete the link or attempt to re-assign it.

Overview of all Active Links and Synchrolinks

Filters

On the *Links* side of the *Selection* dialog box you can choose whether all links or only selected links are to be displayed.

By default, only those links are displayed which have been changed or newly created by your partner, or where date conflicts have arisen. This provides you with an immediate overview of the status of your links.

To view all links, click on the *Display* button in the selection dialog box and choose the menu *All* (or the context menu *All)*. Choose the appropriate menu option to view only critical links or new/changed links.

So that you do not lose track in the web of links in a project, the *Selection* dialog box (see also "Selecting schedules", page 20) features an additional tab entitled *Links*. Here you will find, in a tree structure, all Synchrolinks and Active Links which affect you (see also "Project-wide coordination - Active Link", page 57).

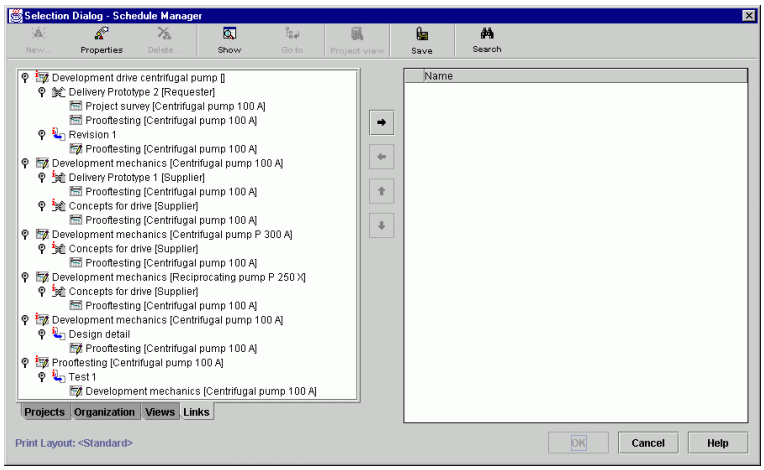


Figure 89: Display of all Active Links and Synchrolinks in the selection dialog

The top level of the tree structure lists schedules with Synchrolinks or Active Links which affect you. All schedules in which there are new or changed links or links with date conflicts are labeled with a red "i" symbol. Double-clicking on a schedule displays the following links in the schedule:

 Icon for a schedule for which you have write permission (pen icon) and in which a changed/new or critical (red "i") Synchrolink/Active Link occurs.

 Icon for an Active Link in which you are the requester. In a new or changed Active Link a red "i" is assigned to the icon.

 Icon for an Active Link in which you are the supplier. In a new or changed Active Link a red "i" is assigned to the icon.

 Icon for a Synchrolink. In a new or changed Synchrolink a red "i" is assigned to the icon. The Synchrolink is given the name of the dependent activity.

The level below the links lists all schedules affected by the relevant Synchrolink or Active Link. To transfer a schedule to the selection list of schedules to be opened, you select the schedule and click on the arrow symbol. You can transfer all schedules associated with an Active Link or Synchrolink in a single step by selecting the relevant link and clicking on the arrow symbol.

E-mail notification

Users affected by changes are automatically informed of the changes not only by means of Synchrolinks and Active Links with RPlan but also separately by e-mail. Consequently, they need not log in to RPlan to find out about any changes. You can decide for each of your schedules whether you want to be notified by e-mail of any changes to the Synchrolinks and Active Links they contain.

However, the following prerequisites must be fulfilled.

- Your user properties must include your correct e-mail address. If your address details change, you can update them yourself in your user properties. To do this, select your own entry in the organization tree structure, click on *Properties* and change the address on the *Personal data* tab (see also "Changing user properties" in the documentation "RPlan administration").
- You must make the corresponding setting in your schedules to indicate whether you want to be notified of changes or not. To do this, select the appropriate tree in the project structure tree, click on *Properties* and choose one of the options in the *E-mail notification* field (see also "Changing schedule properties" in the documentation "RPlan administration").
  - *Not activated*: You receive no notification if a change to a Synchrolink or Active Link affects the schedule.
  - *Task-related*: You automatically receive notification by e-mail if one of your partners changes a Synchrolink or Active Link which affects you. The e-mail informs you of all activities concerned and, in the case of Active Links, the type of change (date change, acknowledgment, etc.).
  - *Schedule-related:* Again, you automatically receive notification by e-mail but the e-mail only informs you in which schedules there are changes.

Your e-mail contents are collected so that each time you update your inbox you see only a single e-mail containing all notifications received to date.

In addition, the creator of an Active Link can decide whether you, as a partner in the link, are to be informed once by e-mail about the new link. This also applies if e-mail notification is not activated for your schedule. In this case, no further e-mails are sent.

Chapter

3

Importing and exporting planning data

Data exchange options

Data exchange prerequisite

An important prerequisite for successful data exchange is that all those participating use the same calendar. If, for example, a Microsoft Project user opens a file exported from RPlan but is using a different calendar , all dates are recalculated in accordance with that calendar. As a result, the new dates no longer match the original dates.

The RPlan calendar uses the standard settings of Microsoft Project:

- Weekends are included, public holidays are not included.
- Working day from 8 a.m. until noon and from 1 p.m. to 5 p.m.

The easy-to-use import/export functions allow you to export RPlan data to Microsoft Project® or other applications, and conversely to import the data of such applications into RPlan. Data is exchanged via the MPX standard interface MPX (Microsoft Project Exchange). This permits simple data exchange with external companies so that all project participants can work together uniformly in RPlan.

Data is imported and exported as described below.

- Up to now you have used Microsoft Project® for your planning and want to continue using your Microsoft Project® data. To do this, you must first create a schedule in RPlan into which you import the activities of the Microsoft Project® file. Refer to "Importing selected activities" , page 71.
- Schedules created for external companies (e.g. component suppliers) can be exported on disk together with other relevant data. Your partners plan their activities in Microsoft Project® and return the data on disk. Re-importing this data into RPlan ensures that this information is then available to all concerned. Refer to "Exporting RPlan data", page 68 and "Importing schedules", page 70.
- You want to work on your own schedules outside the office. You simply export them so that you can work on them in Microsoft Project® and then re-import them later. Again you should refer to the sections "Exporting RPlan data", page 68 and "Importing schedules", page 70.

Exporting RPlan data

First open the schedules to be exported using *File* → *Open*. All schedules now displayed on your screen are copied to a common Microsoft Project® file when you export them.

1. Coose *File* → *Export*... in the RPlan menu.

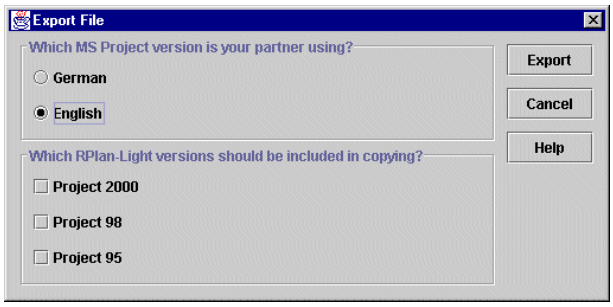


Figure 90: Exporting data

2. Click to choose which language version of Microsoft Project is to be used to edit the exported file.
3. Select the RPlan Light files you want to copy by clicking on them. Template files which are used to map the RPlan menu structure in Microsoft Project are also copied.
4. Click on *Export* to start export.
5. Specify the drive and folder where you want to write the file in the *Export* dialog box. Enter a file name.
6. Confirm your input with *Save*. This starts export. You can now open and edit the exported file in Microsoft Project.

Constraint types in export

In RPlan the constraint types used are different from those used in Microsoft Project. One reason for this is data consistency when exchanging data. The restriction to three constraint types, for example, was necessary to ensure full data exchange with all Microsoft Project versions as of 4.1. The different calculation methods of the various Microsoft Project versions are no longer effective.

The constraint types are translated as follows when data is exported:

Fixed	→	Must Finish On
Variable	→	Start No Earlier Than
Deadline	→	Start No Later Than

RPlan Light

When you export schedules from RPlan Microsoft Project, three template files, Rp_lgt95.mpt, Rp_lgt98.mpt and Rp_lgt2000.mpt, are automatically included in the export. These help represent the RPlan menu structure in Microsoft Project.

Proceed as follows to open an exported file in Microsoft Project:

- First open Rp_lgt95.mpt if you are using Microsoft Project 4.1 (Rp_lgt98.mpt if you are using Microsoft Project 98, Rp_lgt2000.mpt if you are using Microsoft Project 2000). This causes the RPlan menu and the RPlan toolbar to be displayed in Microsoft Project.

- You are now prompted to open a file. Choose the actual export file.

This procedure is a way of guaranteeing data compatibility. For example, RPlan activity classes can be assigned even for external companies who do not use RPlan. Editing of normal Microsoft Project files is not affected.

RPlan export schema for Microsoft Project 2000

Microsoft Project 2000 no longer supports the MPX format for exporting files. You should therefore save data to be exported from Microsoft Project 2000 and loaded into RPlan in TXT format. Export must comply with the RPlan export schema so that TXT files exported from Microsoft Project 2000 can be correctly loaded in RPlan. The RPlan export schema is integrated into Microsoft Project 2000 by means of the template file RP_LGT2000.MPT.

For example, you want to accept schedules or activities generated and processed by your partner using Microsoft Project 2000. You must therefore supply your partner with the template file RP_LGT2000.MPT.

Open the file RP_LGT2000.MPT in Microsoft Project 2000. If you asked if you want to enable macros, you should respond with Yes. The RPlan menu and the RPlan toolbar are displayed in Microsoft Project 2000 and the RPlan export schema is integrated.

You can immediately load the schedule you want to export. When you export the schedule from Microsoft Project 2000 in TXT format, all you need do is select the RPlan export schema so that the exported data can be correctly loaded and edited in RPlan.

The RPlan export schema is retained after you exit Microsoft Project 2000. In other words, you can continue to use the RPlan export schema to export further data at any time.

You should always exit Microsoft Project 2000 using the menu items *File* → *Exit* to ensure that the original settings (menu and toolbar) of Microsoft Project 2000 are active the next time you start the program.

Importing schedules

Microsoft Project fields

You should make sure that the following fields in Microsoft Project are not edited prior to importing because they are used by RPlan:

- *Number2* is used by RPlan for the unique ID of an activity.
- *Text2* is used by RPlan for the following indicators: completed, critical, changed, and private.

The following fields can be edited in Microsoft Project because they correspond to fields displayed in RPlan

- *Text7* is displayed by RPlan in the Responsible column.
- *Text5* is displayed by RPlan in the Remark column.

Re-importing schedules which were created in RPlan, exported to Microsoft Project and edited there is the equivalent of *overwriting* the old version of a schedule with a new version. This is why it is important to ensure that you do not overwrite the wrong schedules. To make sure you don't overwrite the wrong schedule, you can re-import only your own schedules. Note also that the files to be re-imported must be in MPX format. You should ensure that files to be re-imported are available in MPX format for Microsoft Project 95/98 or in TXT format for Microsoft Project 2000.

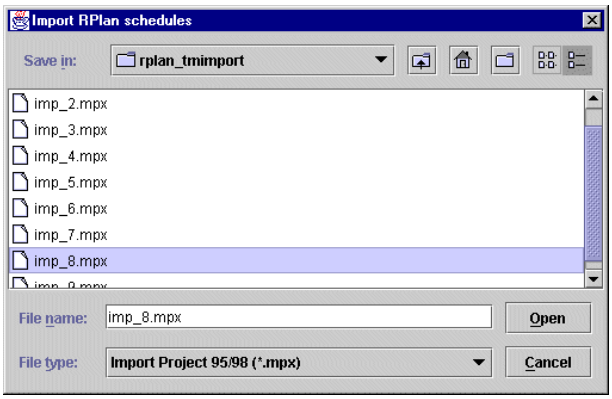


Figure 91: The import dialog box

1. To import the file choose the menu items *File* → *Import* → *RPlan Schedules*. You specify the file to be imported in the *Import* dialog box (Figure 91).
2. Choose the format of the file to be imported in *File type* and click on *Open*.

   If you are importing a Microsoft Project 2000 TXT file, you must specify the language of the file.

   Select the language of the TXT file by clicking on the appropriate language. The date format of the selected language is displayed in the preview field. Click on OK. The Import RPlan Schedules dialog box opens.

   The Import RPlan Schedules dialog box opens immediately if you are importing a file in MPX format.

3. The left column of the Import RPlan Schedules dialog box (Figure 93) displays all schedules of the selected Microsoft Project which you are authorized to import. Here you specify which schedule in the project tree is to be overwritten by the schedule to be imported. To do this, highlight one of the import schedules and click on *Selection*.

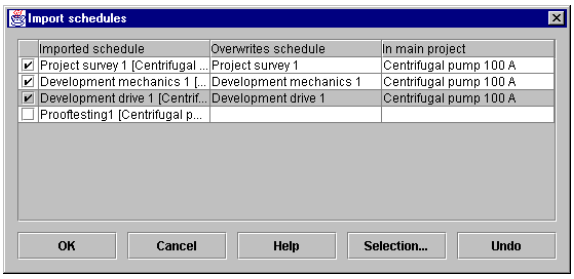


Figure 92: Selecting schedules to be imported

4. This opens the *Select Schedule* dialog box in which you highlight the schedule to be overwritten and click on *OK*.

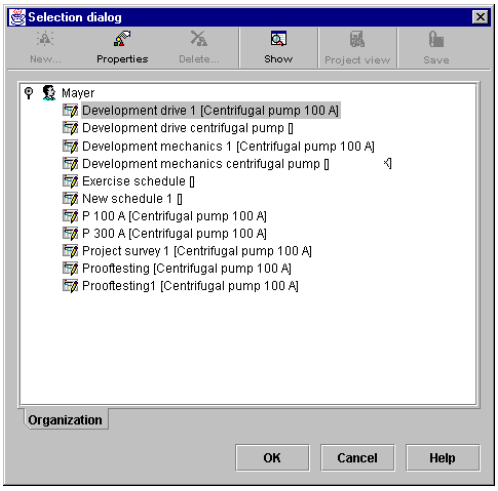


Figure 93: Selecting the schedule to be overwritten

5. Repeat the last step for all appropriate schedules.
6. Confirm your choice with *OK*. The older versions of the selected schedules are now overwritten during the import procedure.

Constraint types in import

The constraint types (refer to "Exporting RPlan data", page 68) are translated as follows when data is imported. This applies for both types of import:

Must Start On	→	Fixed
Must Finish On	→	Fixed
Start No Later Than	→	Deadline
Finish No Later Than	→	Deadline
Finish No Earlier Than	→	Variable
Finish No Earlier Than	→	Variable
As Soon As Possible	→	Variable
As Late As Possible	→	Variable

Importing selected activities

You should use the following import option to incorporate external files in RPlan. Note that these files must have been saved in MPX or TXT format in the original application.

1. First create a schedule (see also "Creating schedules" in the documentation "RPlan administration") into which the activities of the project file can be imported. If you are not authorized to do so, have an authorized person create a schedule for you.
2. Open the schedule and, in the table section, highlight the row above which the imported data is to be inserted.

3. *File* → *Import* → *MPX/TXT files* opens the *Import MPX/TXT Files* dialog box. Select the type of file you want to import in *File type*: MPX or TXT. Select the file you want to import and confirm with *Open*.

   If you are importing an MPX file, its data is loaded now. If you are importing a TXT file, you must specify the language of the file you want to import.

Figure 94: Selecting the language of the TXT file

4. Select the language of the TXT file by clicking on the appropriate language. The date format of the selected language is displayed in the preview field.
5. Confirm with *OK*.

Chapter

4

Printing

Printing

Working view and layout

Most working view settings are reflected in the printout. You should therefore check the following settings in the working view before making a printout.:

- Screen boundary between the table section and the Gantt bar chart
- Column widths in the table section
- Display of summary tasks (with or without individual activities)
- View type
- Zoom factor of the Gantt bar chart

Page setup

You can define print parameters in the *Page Setup* dialog box. The view for which you have opened the dialog box is shown in the title bar of the *Page Setup* dialog box. The parameters you specify here apply only for the current session. When you exit RPlan and log on again later, this dialog box contains default values. You make your settings on the tabs.

Choose *File* → *Page Setup* to define print parameters. The *Page setup* dialog box contains 4 tabs. (Figure 95).

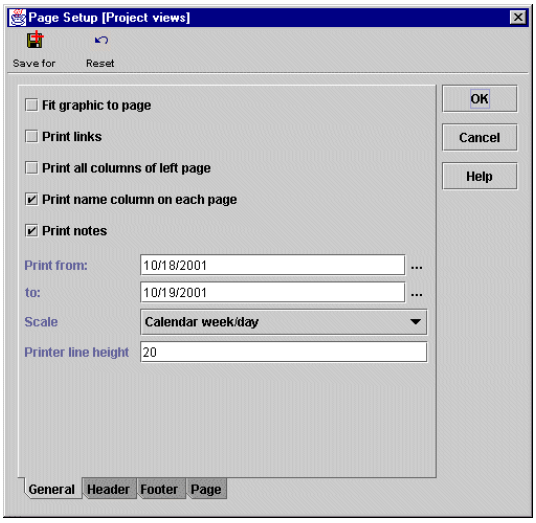


Figure 95: General options available in *Page Setup*

The following functions are available via the icons of the *Page Setup* dialog box:

Save for: This function lets you save a page setup for a view ("Saving page setup settings" on page 78).

Reset: This restores the settings of the *Page Setup* dialog box to their default values.

If you called the *Page Setup* dialog box from the print preview, the following icon is also displayed.

Preview: This icon lets you view changes just made in the print preview without closing the dialog box first (see "Print preview and printing" on page 76).

General tab

- **Fit graphic to page**: zooms the Gantt bar chart out so that it exactly fills a page. The timescale (years, quarters, months, weeks) is not change.
- **Print links** lets you decide whether the link arrows should be visible on the printout or not. Printing links better illustrates time dependencies but may reduce the readability of the printout if there are a large number of links. (see also "Actively networking projects", page 50).
- **Print all columns of left page:** All columns on the left side are printed, regardless of where the window boundary is currently situated.

- **Print name column on each page:** The name column is printed on each page. In a large document this makes it easier to relate the data to the correct schedule or resource.
- **Print notes** lets you print a list of all notes appended to the printed activities.
- **Print from**: Start date of the print period
- **To**: Finish data of the print period
- **Scale**: You can adjust the zoom factor using this selection list.
- **Printer line height**: Here you define the line height for printing. The height applies for printing only.

Headers and footers

Deactivated text

Does the text for the header/footer appear against a light gray background in the *Page Setup* dialog box with the result that it cannot be edited? If so, select the *Print Header* or *Print Footer* option on the *Header* or *Footer* tab.

These tabs let you determine the contents of headers and footers. The text of the header or footer is displayed on sub-tabs named *Left*, *Center* and *Right*. These tab names indicate the position of the text on the header or footer. Information on the user and element to be printed out is included by default on these tabs. You can overwrite or supplement this information. (**Fehler! Verweisquelle konnte nicht gefunden werden.**).

Some items of data relating to the user and the schedule to be printed are preset in the text field of the sub-tabs. These can be overwritten at any time or supplemented by your own text. .

- **Print header** determines whether the printout is to have a header.
- **Print footer** determines whether the printout is to have a footer.
- **Left**, **Right**, **Top**, **Bottom**: These options let you define where a border is printed in the header/footer. If all four options are selected (default), a border is printed all round the header/footer.

Selecting a font

...

You can set the font individually for the header and footer areas. Click on the selection button. You are shown a dialog box which lists the fonts available in your system. Choose the font, font style and font size you want and confirm with OK.

Automatic entries

RPlan provides you with a number of automatic entries (AutoTexts) for headers/footers. These are stored in fields. You can add fields to the left, center or right area of headers/footers. The contents of these fields are included in printouts.

You can design headers/footers according to your own wishes using AutoTexts and your own texts. Choose the area in the header/footer where you want to add an AutoText. Choose the desired field in the Field selection list and click on Add. A code is inserted for each AutoText in the text field of the relevant area. If you have called the Page Setup dialog box from the print preview, you can click on Preview to see how your choice looks in plain text. You can enter not only AutoTexts but also you own texts in the text field. If you insert your own text next to an AutoText, you must ensure that the code for the AutoTexts is not changed or inadvertently overwritten because this would prevent the AutoText from being displayed. The remaining code would be displayed instead.

You can also select a line as an AutoText in order, for example, to separate two entries. Automatic spacing is inserted below the line but only if there is a paragraph mark after the line field. If you want to insert spacing above the line, you must insert a paragraph mark above the line.

Not all automatic entries can be shown for all objects to be printed. The fact that an automatic entry cannot be shown for a range is indicated by a hyphen "-" in the footer/header.

Page tab

You define the paper size, orientation and page margins on this tab. You can view the effects of your settings in the preview field.

- **Paper size**: Select the paper size for your printout from this selection list.
- **Orientation**: Specify the orientation for your printout (portrait or landscape).
- **Left**, **Top**, **Right**, **Bottom margin**: Enter a numeric value for each page margin.

Print preview and printing

Proceed as follows to check the layout and to start printing :

1. Choose the menu items Edit → Print and respond to the Save prompt. You are now shown a print preview for your print job. Navigate through the print preview and check whether the layout is in accordance with your wishes (Figure 96).

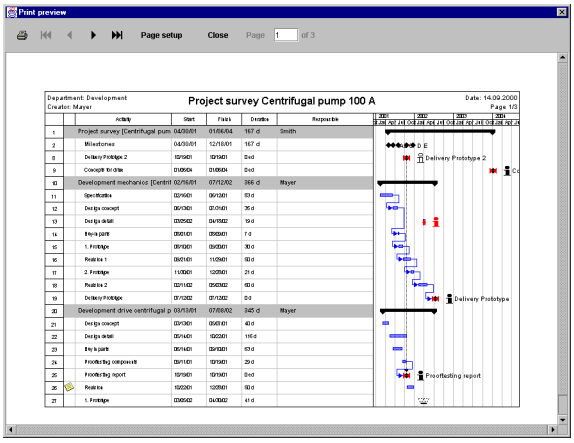


Figure 96: Page preview in RPlan Java

Preview

The *Page Setup* dialog box has an additional button, *Preview*, when it is opened from the print preview. Clicking on this button applies your changes to the print preview without exiting the dialog box.

2. To make changes to the overall layout, you exit the print preview using Close and change the layout in the working view .
3. To make changes to the print options or to the header/footer, click *Page Setup* and make the desired changes there. (See Preview)
4. Click on the *Print* icon in the print preview. You can send the print job direct to the printer, or save it as a PDF or Postscript file.

- **Printer:** If you choose this option, a print dialog box opens whose appearance differs according to the system you are working with. Select the desired printer and, if necessary, additional options. Confirm the print dialog.
- **PDF file:** If you choose this option, you are requested to enter the name of the file and its save location. Choose the drive and directory and type the name of *the file* in the File name field. *Confirm* your input with *Save.*

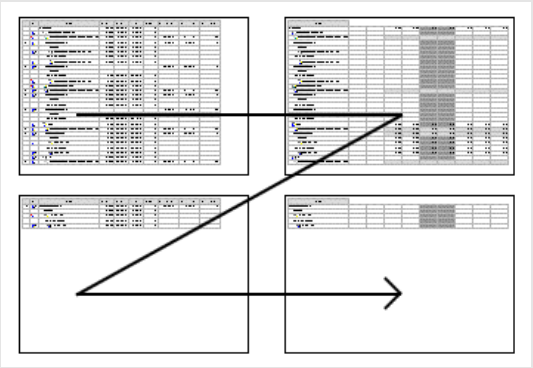
  The advantage of this form of output is that you can save print jobs to PDF files and print them out later as required. You can open, read and print PDF files using the Adobe Acrobat Reader (free download at www.adobe.com). You can also quickly and simply attach PDF files to e-mails and send them to other members of staff.
- **Postscript file**: This option lets you redirect the print job to a Postscript file. You can save the file as a PS (Postscript) or EPS (Encapsulated Postscript) file. Choose the appropriate drive and folder and enter the name of the file in the *File name* field. Choose the desired format in the *File type* selection list and confirm your input with *OK*.

Brief instructions: Printing

1. Choose the menu items *File* → *Print*.
2. Issue your print job and check the page layout.
3. Return to the working view to make table changes.
4. *Page Setup* to make changes to the print options or header/footer.
5. Issue your print job.

Navigation in the print preview

You can navigate in the preview using the arrow buttons in the toolbar. If the data to be printed extends over more than one page, printing is carried out in a predefined order: from left to right and then down, then starting again from the left.



In the print preview you can therefore navigate to the left, right, up and down.

 Scroll down one page

 Scroll to first page

 Scroll back one page

 Scroll forward one page

 Scroll to last page

 Scroll up one page

Saving page setup settings

You can define and save a custom page setup (e.g. position and contents of header/footer, margins) as a print template. You can then use the template each time you print data. Page setup affects only the appearance of the page, not its contents.

You can save a custom page setup for the working view and the Active Link logs.

You can also save a page setup for each favorites list. To do this, you must first load the favorites list.

1. Open a schedule or favorites list for which you want to define a page setup and choose the menu items *File* → *Print* or click on the *Print* icon in the toolbar.
2. Call the *Page Setup* dialog box in the print preview by clicking on the *Page setup* button.
3. Arrange the page setup according to your wishes in the *Page Setup* dialog box (see "Page setup" on page 73). Click on the *Preview* button to view changes you make to the page setup.
4. Once you have completed page setup, click on the *Save for* icon and choose the view (project view for the working view or logs for Active Link logs) for which you want to save the page setup. If you have saved a page setup for a favorites list, choose *Favorites lists*.

   If you want to use the same page setup for the working view and the logs, save the page setup for the working view and then the setup for the logs using the *Save for* icon.

Printig Active Link logs

1. Call the properties for the Active Link whose log you want to print.
2. Click on the Print icon in the toolbar. The print preview is displayed.

   The log overview with the header and the requester and supplier areas is shown in the print preview. If you want to print the overview only, start printing immediately by clicking on the *Print* icon.

3. To view and print the individual actions, click on the *Page setup* button and select the *Print history* function. You can restrict the print period using the *Print history from* and *Print history to* fields. If you leave both fields blank, all actions are displayed and printed. To enter a start or finish date, click in the checkbox of the appropriate field and type in a date or choose a date using the selection button. You can start printing once you have specified the print period.

   When you print logs, you can direct print output not only to a printer but also to a PDF or Postscript file.

4. Click on the *Print* icon to display the available print options.

- **Printer:** If you choose this option, a print dialog box opens whose appearance differs according to the system you are working with. Select the desired printer and, if necessary, additional options. Confirm the print dialog.

- **PDF file:** If you choose this option, you are requested to enter the name of the file and its save location. Choose the drive and directory and type the name of the file in the *File name* field. Confirm your input with *Save.*
- **Postscript file**: This option lets you redirect the print job to a Postscript file. You can save the file as a PS (Postscript) or EPS (Encapsulated Postscript) file. Choose the appropriate drive and folder and enter the name of the file in the *File name* field. Choose the desired format in the *File type* selection list and confirm your input with *OK*.

Index

A

Accepting
  Active Link 61
Active link 50, 57
  Creating 57
  Deleting 63
  Responding 61
Active Link 49, 61
  Overview in selection dialog 64
  Rejecting 63
Activities
  Identifying 42
Activity
  Changing 27
  Changing duration with the mouse 30
  Copying 31
  Cutting 31
  Deleting 29
  Entering 25
  Moving activities with the mouse 30
Activity classes 28
Actual and target data 49
Actual data 49
Adjusting 56
Adjusting dates 48
All tasks 49
And 45
And / Or logical operators 45
As late as possible 71
As soon as possible 71
Autolink 50–51

C

Calendar 67
Certificate 11
Changed 42
Changing
  Active Link 61
Client/server 15
Column width 21, 25
Completed 42
  Active Link 61
Constrain task 54
Constraint type 49, 56
Constraint types 49, 53, 68, 71
Copying 31
Critical 42–43
Current date 41
Cutting 31

D

Data exchange 67
Date
  Changes 62
  Entering 26
Deadline 49, 53, 68, 71
Delete 23, 45
Demoting 36
Diagram rows 41
Display 41
Duration 24–25, 27

E

E-mail notification 65
Enter 45
Exiting 13
Expand 55, 60
Expand all 37
Expand subtree 37
Expanding 37
Export 67–68
Extend/reduce 42

F

Favorites lists
  Changing properties 39
  Deleting 40
  Saving in the working view 40
  Selecting 39
Filter
  Criteria 45
  Date 44
  Text 44
  User-defined 45
Filters
  Copying 47
  Deleting 47
  Standard 43
Finish 24–25
Finish no earlier than 71
Finish No Earlier Than 68
Finish no later than 71
Finish-Finish 52
Finish-Start 52
Fixed 49, 54, 68, 71
Footer 75
  Print 75
Framework 12

G

Go To 27

H

Header 75
  Print 75
Hyperlinks 43

I

i 54–55, 57, 61
Import 67–70, 71
Importing 11
Intranet 10–11

L

lag 54
Lag 51
Language 50
Layout 41, 73, 76
  Saving user-defined 41
Linking 51

Links 16, 50, 74
  Cross-schedule 54
  Printing 74
Logic operation on filter criteria 45
Login dialog box 10
Login name 10–11, 13

M

Magnifying glass 28
Message
  Active Link 61
Microsoft Project 67–70
Microsoft Project Exchange 67
Modules 12
Monthly view 28
Move down 23
Move up 23
MPX 67
Must finish on 71
Must Finish On 68
Must start on 71

N

New 23
New (schedule) 18
Not activated 65
Notes 47, 75

O

One row display mode 33
Only Selected Activities 44
Only selected link 22
Open 20
Or 45
Organization only 23
Organization structure tree 16, 18–19
Organization tree 15, 18
Outline levels
  Showing and hiding 37
Own objects 23
Own tasks 43
Owner
  Changing 40
  Ownership principle 16

P

Page setup 41, 73
Password
  Changing 13
PDF file 77, 79
Plan Fehler! Ungültige Textmarke in einem Eintrag auf der Seite 16
Plug-in 11, 12
Preview 76
Print
  Orientation 76
  Paper size 76
  PDF file 77, 79
Print all columns 74
Print name on each page 75
Print preview 76
Printer line height 75
Printing 11, 73, 76
  In the Java user interface 73
Private 42
Project
  Creating 19
Project structure 16
Project team 18
Project tree Fehler! Ungültige Textmarke in einem Eintrag auf der Seite 15
Projects 16
Projects only 23
Promoting 36–37
Properties 23, 43, 54

Q

Quarterly view 28

R

Reduce to first level 37
Reject 63
Rejecting
  Active Link 61
Remarks 24
Remove 23
Remove all 45
Removing 22, Fehler! Ungültige Textmarke in einem Eintrag auf der Seite 35
Requester 57, 62
Responsible 24
Restrict project view 23
Rights 16
Row height 41
Rp_lgt200.mpt 69
Rp_lgt95.mpt 69
RPlan Light 69

S

Save as view 23, 38
Saving 29
Schedule 18
  Adding 40
  Changing selection 42
  Copying 31
  Creating 19
  Deleting 22, 40
  Other users 16
  Schedule and all links 22
  Selecting 20, 21
  Sorting 21
  Structuring 33
Schedule title 25
Schedule-related 65
Schedules
  Sorting 40
Screen separator 24
Selection dialog box 18, 20
Start 24–25, 27, 44
Start-Finish 52
Starting RPlan 10
Structure tree 15
Summary bar 33, 35
Summary task 33, 35
  Creating 35
  Deleting 35
Supplier 57
Synchrolink 50, 54
  Overview in selection dialog 64

T

Target/actual comparison 49
Task notes 47
Task-related 65
Type 51

U

Undo 29
Update 29
User-defined 45

V

Variable 53, 68, 71
View
  Saving 38
View Type 49
Views 38

W

Weekly view 28, 30
Working view 24, 42, 73

Y

Yearly view 28

Z

Zoom in 28
Zoom out 28